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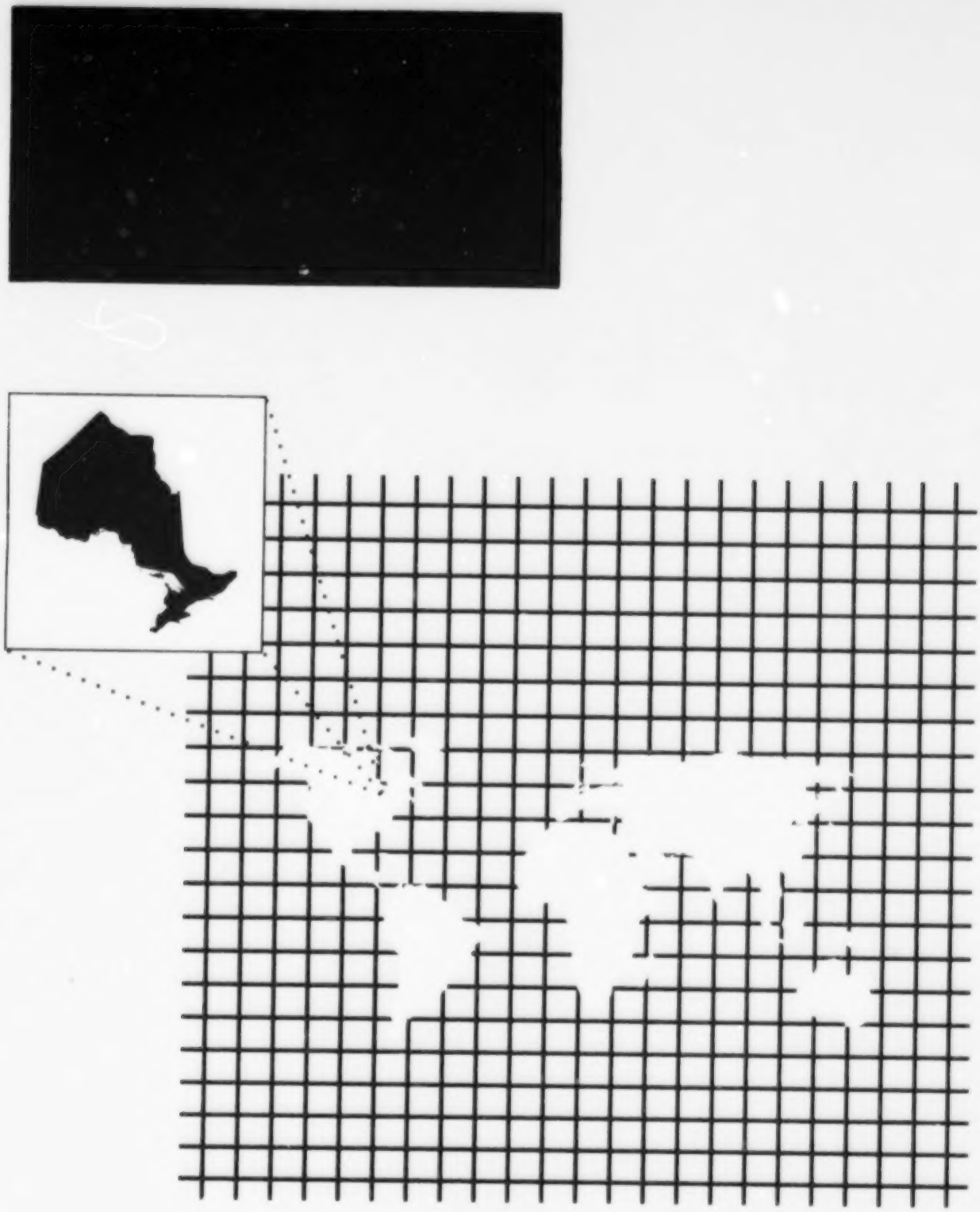
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Ontario's Overnight Pleasure Market - 1998

and 1979-1998

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HIGHLIGHTS

- In 1998, 107 million person visits were made in Ontario by same day and overnight visitors from across Canada and around the world. Those who visited Ontario primarily for pleasure accounted for 42.4% of this total, or for 45.3 million person visits. Overnight pleasure visitors accounted for 40% of the total pleasure visitors, or for 18.1 million person visits.

- Three-quarters of Ontario's overnight pleasure visitors came, in 1998, from Ontario, Michigan and New York, with Ontario accounting for 86% of these three-quarters.

- Canadians, with the exception of those living in Metro Toronto and Winnipeg, had a higher incidence of overnight non-pleasure travel to Ontario than overnight pleasure travel, while for the Americans the opposite was true (Americans accounted for 19.6% of all overnight visitors to Ontario, but for 25.2% of the province's overnight pleasure visitors).

- On average, Ontario's overnight visitors, as well as its overnight pleasure visitors, spent 3.15 nights in the province in 1998. As expected, overseas overnight visitors stayed the longest (with UK and Germany having the longest lengths of stay among overseas countries), followed by Americans and Canadians.

- Overnight pleasure visitors from Canada stayed longer in Ontario than other Canadian overnight visitors, while for the American and overseas visitors the opposite was true. Overnight overseas visitors who came to Canada in 1998 for the purpose of visiting their friends or relatives stayed in Ontario twice as long (12.7 nights) as overnight pleasure visitors from these countries.

- Close to two-thirds (62%) of Ontario's overnight pleasure visitors stayed in the province for two nights or less and 77% stayed for three nights or less. Only 4% of Ontario's overnight pleasure visitors stayed in the province for ten or more nights. Ontarians on an overnight pleasure trip in Ontario had the highest incidence (81%) of taking a short getaway trip (3 nights or less) in the province, followed by Americans (78%) and finally overseas visitors (43%). In general, the further away a visitor to Ontario came from, the longer he/she stayed in the province.

- Overnight pleasure visitors generated 57.1 million of person nights in Ontario, or 45% of the total nights generated in the province by all overnight visitors.

- Compared to other overnight visitors, overnight pleasure visitors had a much higher incidence of travel during the summer and a much lower incidence of travel during the winter and fall. The majority (53%) of Ontario's overnight pleasure visitors travelled in the province during the July-September period (3rd quarter). This observation held across most of Ontario's main markets, with the exception of the U.S. border states, the U.K. and Japan (although the largest proportion of pleasure visitors from these three regions came to Ontario during the summer, this proportion did not constitute a majority)

- The majority of the overnight pleasure visitors who were visiting Ontario during the first and fourth calendar quarters stayed in commercial roofed accommodation, while the majority of those travelling in Ontario during the second and third quarters stayed in non-commercial accommodation and campgrounds. The first and fourth quarters also received the largest share of overnight pleasure visitors who stayed at the homes of friends or relatives, while the third quarter received the largest share of overnight pleasure visitors who stayed at a private cottage.

- Because a much higher proportion of the overnight pleasure visitors who visited Ontario during the first

and fourth quarters used commercial roofed accommodation, the average spending per overnight pleasure visitor-per night was much higher during the first and fourth quarters than it was during the second and third quarters. On the other hand, average spending per overnight pleasure visit was lower in the first quarter than it was in the second, third and fourth quarters because the average length of stay during the first quarter was lower.

- Although most of the overnight pleasure visitors in Ontario travelled in groups of two or more persons (62.0%), a sizeable group travelled alone (38.0%). The incidence of travelling with no companions was the lowest among American and French overnight pleasure visitors (only 13.1% of the Americans and 11.6% of the French overnight pleasure visitors travelled alone in Ontario) and the highest among Canadians (45.2%).

- Eight out of every ten travel parties (80.3%) who were visiting Ontario while on an overnight pleasure trip travelled in groups comprised of adults only, and about two-in-ten (19.7%) travelled with children under the age of 15. Of those travelling in adult parties, 47.4% travelled in groups comprised of one adult, 44.9% travelled in groups comprised of two adults and 7.7% in groups comprised of three or more adults.

- Overnight pleasure visitors travelling in parties comprised of adults only generated 79.7% of the party nights spent in Ontario. Since this share is slightly lower than their corresponding share of party visits, this implies that travelling parties with children stayed longer in Ontario than travelling parties with adults only. This was especially true for overnight pleasure visitors from Ontario, other Canadian provinces, the U.S., Germany and Japan. A consequence of the longer length of stay of parties with children was the fact that although these visitors accounted for 19.7% of Ontario's overnight pleasure parties, they accounted for 20.8% of the total expenditures incurred by overnight pleasure visitors, rendering them a higher yield market segment than those travelling in adults-only parties.

- Compared to other overnight visitors, overnight pleasure visitors had a much higher incidence of utilization of roofed commercial accommodation (42.9% vs. 34.5%) and consequently a lower usage of non-commercial accommodation (36.8% vs. 55.0%). They also had a much higher incidence of utilization of camping/trailer parks (17.5% vs. 8.9%).

- Almost a third (31.0%) of the Canadian overnight pleasure visitors used roofed commercial accommodation, 21.1% used campgrounds and 46.1% used non-commercial accommodation, such as the homes of friends/relatives or private cottages. On the other hand, 70.5% of the overnight pleasure visitors from the U.S. used commercial roofed accommodation, 9.9% used campgrounds and only 13.2% used homes of friends or relatives, or private cottages. Overnight pleasure visitors from overseas countries had the highest incidence of utilization of commercial roofed accommodation (73%) and the lowest incidence of utilization of campgrounds (4%).

- Overnight pleasure visitors were more active than other overnight visitors, with overnight pleasure visitors from overseas countries being the most active. Outdoor activities were by far the most popular among Ontario's overnight pleasure visitors (55.6%), followed by sightseeing (42.0%) and shopping (39.4%). Outdoor activities, visiting parks/historic sites and sightseeing were the activities that truly differentiated overnight pleasure visitors from other overnight visitors.

- On the other hand, Americans and overseas visitors on an overnight pleasure trip to Ontario were much more inclined to go sightseeing, to go shopping, to attend cultural events, to visit parks or historic sites and to participate in nightlife/entertainment. Surprisingly, overnight pleasure visitors from overseas countries had the highest incidence of visiting friends or relatives and the highest incidence of visiting a theme park (the latter is surprising because overnight pleasure visitors from overseas countries had the lowest incidence of travel with children under the age of 15).

- The types of activities that overnight pleasure visitors from different origins engaged in imply that Ontario's overnight international pleasure visitors had, in 1998, a more urban orientation than its domestic overnight pleasure visitors did.

- Although Metro Toronto was the top region visited among all overnight visitors, accounting for 20.8% of them, it was Festival Country that rose to the top of the places visited in the province by overnight pleasure visitors (20.2%), followed by Lakelands (19.4%). Metro Toronto was almost tied in the third place with Ontario East, each one accounting for 14.1% of Ontario's overnight pleasure visitors.

- Given the outdoor nature of the overnight pleasure visitors, travel regions that offered more of an outdoor product (such as Ontario's northern regions, Lakelands and even Festival Country) faired better among this group of visitors than among other overnight visitors.

- Metro Toronto was the most popular region among overnight pleasure visitors from overseas countries, the second most popular region among American overnight pleasure visitors (shopping, cultural events and nightlife being the main attractions for the Americans) and the seventh most popular region among Ontario residents (who favoured Lakelands). These observations point out again to the urban/rural split between Ontario's international and domestic visitors.

- The expenditures of pleasure visitors accounted for 42.1% of the total spending in Ontario by all visitors, while the spending of the overnight pleasure visitors accounted for 41.0% of the total expenditures of all overnight visitors in the province. Overall, pleasure visitors had an average spending per person visit of $118, as compared to an average of $119 of the general visitor population. Overnight pleasure visitors had an average spending per person visit of $210, while the general overnight visitor of Ontario had a slightly higher average of $232 per person visit.

- Ontario residents had the lowest average spending per overnight pleasure visit ($120), as well as per overnight party visit ($236) and per overnight party per night ($84). Overnight pleasure visitors from the U.S. had an average spending per person visit that was over two and a half times higher than that of Ontarians' ($318), while overseas overnight pleasure visitors had an average per person visit spending that was almost seven and a half times higher than that of Ontarians' ($878), partly because of high transportation costs to reach Ontario.

- International visitors were asked to rate various aspects of their stay in Ontario relative to their home country. The majority of the American visitors who were on an overnight pleasure trip to Ontario rated transportation services, accommodation services, hospitality of local people and the variety of things to see and do as essentially the same in Ontario as in the United States.

- Given the low value of the Canadian dollar during 1998 (the lowest ever), a majority of American overnight pleasure visitors also rated "value for money" as being better in Ontario than back home. Although "value for money" was the only item that was ranked by Americans as being better in Ontario than in the U.S., it also had the highest negative rating (12.9%), while the hospitality of local people received the lowest negative rating from overnight pleasure visitors from the United States.

- The majority of the overnight pleasure visitors from overseas countries rated the "hospitality of local people" and accommodation services as essentially the same in Ontario as back home. For the remaining services, overseas visitors were divided between those ranking them as better in Ontario and those ranking them as the same. Overall, overseas visitors had a higher negative rating of transportation services than Americans, with Germans having one of the highest negative ratings of this service (25.4%).

- Overnight pleasure travel in Ontario decreased by -15.4% over the period 1979-1998, from 21.4 million visits in 1979 to 18.1 million visits in 1998. In contrast, total overnight travel in Ontario declined over the same period by -7.0%. The largest decline in overnight pleasure travel was observed in 1992 - the result

of the on-going recession and an exceptionally cold and wet summer (this is the season most pleasure visitors travel in Ontario). Since 1992, however, overnight pleasure travel appears to be recovering better than the overall overnight market. On average, overnight pleasure visits increased over the period 1992-1998 by 0.8% per year, while total overnight visits have been declining at an annual average rate of –1.08%, mainly due to the decline in business travel.

- The decline in overnight person visits since 1979 is attributable mainly to the decline in overnight pleasure visits taken by Ontario residents within their own province (down by 24.2% from 1979 to 1998). US overnight pleasure visits to Ontario declined, over the same period by 1.4%, while overnight pleasure visits to Ontario from overseas countries increased by 121.0%, notwithstanding the economic crisis that many overseas countries were experiencing in 1998. As a result of these differential growth rates, Ontarians' importance in the province's overnight pleasure market declined from 72.1% in 1979, to 64.7% in 1998, the Americans' share increased to 25.3% and the overseas countries' share increased from 1.8% in 1979, to 4.7% in 1998.

POINTS SAILLANTS

- En 1998, 107 millions de visites-personnes ont été faites en Ontario par des visiteurs d'une journée et des visiteurs avec hébergement venant du reste du Canada et des autres pays du monde. Ceux qui venaient en Ontario principalement pour le tourisme récréatif représentaient 42,4 % de ce total, soit 45,3 millions de visites-personnes. Les visiteurs d'agrément avec hébergement représentaient 40 % du total des visiteurs d'agrément, soit 18,1 millions de visites-personnes.

- Pour 1998, les trois quarts des visiteurs d'agrément avec hébergement de l'Ontario provenaient de l'Ontario, du Michigan et de l'état de New York, l'Ontario représentant 86 % de ces trois quarts.

- Les Canadiens et les Canadiennes, à l'exception de ceux vivant dans le Grand Toronto et Winnipeg, représentaient une incidence plus forte de voyages professionnels avec hébergement en Ontario par rapport aux voyages d'agrément avec hébergement tandis que pour les visiteurs américains, c'est l'inverse qui est vrai (les Américains représentaient 19,6 % de l'ensemble des visiteurs avec hébergement en Ontario mais 25,2 % des visiteurs d'agrément avec hébergement de la province).

- En moyenne, les visiteurs avec hébergement en Ontario, ainsi que les visiteurs d'agrément avec hébergement, ont passé 3,15 nuits dans la province en 1998. Comme prévu, les visiteurs avec hébergement venant de pays d'outre-mer sont restés le plus longtemps (les visiteurs du Royaume-Uni et de l'Allemagne représentant les séjours les plus longs parmi les pays d'outre-mer), suivis des visiteurs américains et canadiens.

- Les visiteurs d'agrément avec hébergement venant du Canada restaient en Ontario plus longtemps que les autres types de visiteurs canadiens avec hébergement, tandis que pour les visiteurs américains et ceux provenant des pays d'outre-mer, c'est l'inverse qui est vrai. Les visiteurs avec hébergement des pays d'outre-mer qui sont venus au Canada en 1998 dans le but de rendre visite à des amis ou parents sont restés en Ontario deux fois plus longtemps (12,7 nuits) que les autres visiteurs d'agrément avec hébergement de ces pays.

- Près des deux tiers (62 %) des visiteurs d'agrément avec hébergement en Ontario sont restés dans la province pour deux nuits ou moins et 77 % sont restés pour trois nuits ou moins. Seulement 4 % des visiteurs d'agrément avec hébergement en Ontario sont restés dans la province pour dix nuits ou plus. Les Ontariens et Ontariennes en voyage d'agrément avec hébergement dans la province représentaient l'incidence la plus forte (81 %) de participation à un voyage de courte durée dans la province (3 nuits ou moins), suivis des visiteurs américains (78 %) et des visiteurs des pays d'outre-mer (43 %). En général, plus le visiteur de la province vient de loin, plus il y reste longtemps.

- Les visiteurs d'agrément avec hébergement ont généré 57,1 millions de nuits-personnes en Ontario, soit 45 % du total des nuits passées dans la province par l'ensemble des visiteurs avec hébergement.

- En comparaison avec les autres visiteurs avec hébergement, les visiteurs d'agrément avec hébergement représentaient une incidence beaucoup plus forte de voyages durant l'été et une incidence beaucoup plus faible pendant l'hiver et l'automne. La majorité (53 %) des visiteurs d'agrément avec hébergement en Ontario ont voyagé dans la province durant la période juillet-septembre (troisième trimestre). Cette observation reste valable pour la plupart des marchés principaux ontariens, à l'exception des états américains frontaliers, du Royaume-Uni et du Japon (malgré le fait que la proportion la plus importante des visiteurs d'agrément de ces trois régions venait en Ontario pendant l'été, cette proportion ne représentait pas une majorité).

- La majorité des visiteurs d'agrément avec hébergement en Ontario pendant les premier et dernier trimestres de l'année civile a séjourné dans des installations commerciales dotées d'un toit tandis que la majorité ce ceux voyageant en Ontario pendant les deuxième et troisième trimestres ont séjourné dans des installations non commerciales et des terrains de camping. Les deuxième et troisième trimestres recevaient également la part la plus importante des visiteurs d'agrément avec hébergement séjournant au domicile d'amis ou de parents tandis que le troisième trimestre recevait la part la plus importante des visiteurs d'agrément avec hébergement séjournant dans des chalets privés.

- À cause du fait qu'une proportion beaucoup plus importante des visiteurs d'agrément avec hébergement en Ontario pendant les premier et dernier trimestres séjournait dans des installations commerciales dotées d'un toit, les dépenses moyennes par visiteur d'agrément avec hébergement et par nuit étaient beaucoup plus élevées pendant les premier et dernier trimestres que pendant les deuxième et troisième trimestres. Par ailleurs, les dépenses moyennes par visite d'agrément avec hébergement étaient plus faibles pendant le premier trimestre que pendant les deuxième, troisième et quatrième trimestre car la durée moyenne de séjour pendant le premier trimestre était plus courte.

- Bien que la majeure partie des visiteurs d'agrément avec hébergement en Ontario voyageait en groupes de deux personnes ou plus (62,0 %), une part importante de visiteurs voyageait seul (38,0 %). L'incidence des voyages sans compagnon était la plus faible chez les visiteurs d'agrément avec hébergement américains et français (seulement 13,1 % des visiteurs d'agrément américains avec hébergement américains et 11,6 % des visiteurs d'agrément français avec hébergement voyageaient sans compagnon en Ontario) et l'incidence la plus forte s'observait chez les Canadiens (45,2 %).

- Huit sur dix groupes de voyageurs (80,3 %) visitant l'Ontario pour un voyage d'agrément avec hébergement voyageaient en groupes comprenant uniquement des adultes et environ deux groupes sur dix (19,7 %) voyageaient avec des enfants de moins de 15 ans. Parmi ceux voyageant par groupes d'adultes, 47,4 % voyageaient en groupes comprenant un adulte, 44, 9 % % voyageaient en groupes comprenant deux adultes et 7,7 % en groupes comprenant trois adultes ou plus.

- Les visiteurs d'agrément avec hébergement voyageant en groupes d'adultes uniquement ont généré 79,7 % des nuits de groupe passées en Ontario. À cause du fait que cette proportion est légèrement inférieure à la part correspondante des visites de groupe, cela signifie que les groupes voyageant avec des enfants sont restés en Ontario plus longtemps que les groupes voyageant avec des adultes uniquement. Cela est particulièrement vrai pour les visiteurs d'agrément avec hébergement venant de l'Ontario, des autres provinces canadiennes, des États-Unis, d'Allemagne et du Japon. Une conséquence de la plus longue durée des séjours des groupes avec enfants était, qu'en dépit du fait que ces visiteurs représentaient 19,7 % des groupes de visiteurs d'agrément avec hébergement en Ontario, ils représentaient 20,8 % des dépenses totales faites par les visiteurs d'agrément avec hébergement, ce qui fait d'eux un segment de marché plus rentable que les visiteurs adultes uniquement.

- En comparaison avec les autres visiteurs avec hébergement, les visiteurs d'agrément avec hébergement représentaient une incidence beaucoup plus forte d'utilisation des installations d'hébergement commerciales dotées d'un toit (42,9 % contre 34,5 %) et par conséquent un usage plus restreint des installations d'hébergement non commerciales (36,8 % contre 55,0 %). Ils représentaient aussi une incidence beaucoup plus forte d'utilisation des terrains de camping/de caravane (17,5 % contre 8,9 %).

- Près d'un tiers (31,0 %) des visiteurs canadiens d'agrément avec hébergement ont utilisé une installation d'hébergement commerciale dotée d'un toit, 21,1 % ont utilisé un terrain de camping et 46,1 % ont utilisé des installations d'hébergement non commerciales telles le domicile d'amis ou de parents ou des chalets privés. Par ailleurs, 70,5 % des visiteurs d'agrément avec hébergement provenant des États-Unis ont utilisé des installations d'hébergement commerciales dotées d'un toit, 9,9 % ont utilisé un terrain de camping et seulement 13,2 % ont utilisé le domicile d'amis ou de parents ou des chalets privés. Les visiteurs d'agrément avec hébergement provenant de pays d'outre-mer représentaient la plus forte

incidence d'utilisation d'installations d'hébergement commerciales dotées d'un toit (73 %) et l'incidence la plus faible d'utilisation de terrains de camping (4 %).

- Les visiteurs d'agrément avec hébergement était plus actifs que les autres visiteurs avec hébergement, les visiteurs d'agrément avec hébergement venant des pays d'outre-mer étant les plus actifs. Les activités de plein air étaient de loin les plus populaires parmi les visiteurs d'agrément avec hébergement en Ontario (55,6 %), suivies des visites de sites naturels (42,0 %) et du magasinage (39,4 %). Les activités de plein air, les visites de parcs et de sites historiques ainsi que les visites de sites naturels étaient les activités qui différenciaient véritablement les visiteurs d'agrément avec hébergement des autres visiteurs.

- Par ailleurs, les visiteurs américains et des pays d'outre-mer en voyage d'agrément en Ontario étaient plus enclins à visiter des sites naturels, à magasiner, à assister à des événements culturels, à visiter des parcs ou des sites historiques et à assister à des spectacles/attractions nocturnes. De façon surprenante, les visiteurs d'agrément avec hébergement venant des pays d'outre-mer représentaient l'incidence la plus forte de visites d'amis et de parents et l'incidence la plus forte de visite de parcs d'attractions thématiques (cette dernière observation est surprenante car les visiteurs d'agrément avec hébergement venant des pays d'outre-mer représentaient l'incidence la plus faible de voyages avec enfants de moins de 15 ans).

- Les types d'activités auxquels se livraient les visiteurs d'agrément avec hébergement d'origines différentes signifient qu'en 1998, les visiteurs d'agrément internationaux avaient une orientation plus urbaine que les visiteurs d'agrément canadiens avec hébergement.

- Bien que le Grand Toronto était la région principale visitée par tous les visiteurs avec hébergement, soit 20,8 % d'entre eux, le pays des festivals était en première position des lieux de la province visités par les visiteurs d'agrément avec hébergement (20,2 %), suivi par le pays des lacs (19,4 %). Le Grand Toronto était quasiment à égalité pour la troisième place avec l'est de l'Ontario, chacun d'eux représentant 14,1 % des visiteurs d'agrément avec hébergement en Ontario.

- Étant donné l'intérêt pour le plein air des visiteurs d'agrément avec hébergement, les régions touristiques offrant surtout un attrait pour les amateurs de plein air (comme par exemple les régions du nord de l'Ontario, le pays des lacs et même le pays des festivals) ont été plus fréquentées par ce groupe de visiteurs que par les autres visiteurs avec hébergement.

- Le Grand Toronto était la région la plus populaire parmi les visiteurs d'agrément avec hébergement provenant des pays d'outre-mer, la seconde région la plus populaire parmi les visiteurs d'agrément avec hébergement provenant des États-Unis (le magasinage, les événements culturels et les activités nocturnes étant les attractions principales pour ces visiteurs américains) et la septième région la plus populaire parmi les résidents ontariens (lesquels préfèrent le pays des lacs). De nouveau, ces observations font remarquer la différence d'intérêt urbain/rural entre les visiteurs internationaux et locaux de l'Ontario.

- Les dépenses des visiteurs d'agrément représentaient 42,1 % du total des dépenses de tous les visiteurs de l'Ontario, tandis que les dépenses des visiteurs d'agrément avec hébergement représentaient 41,0 % du total des dépenses de tous les visiteurs avec hébergement de l'Ontario. Dans l'ensemble, les visiteurs d'agrément représentaient des dépenses moyennes par personne-visite de 118 $ comparés à une moyenne de 119 $ pour la population générale des visiteurs. Les visiteurs d'agrément avec hébergement représentaient des dépenses moyennes par personne-visite de 210 $ comparés à une moyenne un peu supérieure de 232 $ par personne-visite pour la population générale des visiteurs avec hébergement de l'Ontario.

- Les résidents de l'Ontario représentaient la moyenne la plus faible des dépenses par visite d'agrément avec hébergement (120 $) ainsi que pour les visites avec hébergement de groupe (236 $) et les visites de groupe par nuit (84 $). Les visiteurs d'agrément avec hébergement venant des États-Unis représentaient des dépenses moyennes par personne-visite qui étaient deux fois et demi supérieures à

celles des Ontariens (318 $) tandis que les visiteurs d'agrément avec hébergement venant d'outre-mer représentaient des dépenses moyennes par personne-visite qui étaient presque sept fois et demi supérieures à celles des Ontariens (878 $), partiellement en raison des coûts de transport élevés pour arriver en Ontario.

- On a demandé à des visiteurs internationaux de noter/classer différents aspects de leur séjour en Ontario en comparaison avec leur pays d'origine. La majorité des visiteurs américains qui ont fait un voyage d'agrément avec hébergement en Ontario ont classé les services de transport, les services d'hébergement, l'hospitalité des résidents locaux et divers autres facteurs de visite et d'attractions comme étant essentiellement au même niveau en Ontario et aux États-Unis.

- En raison du faible niveau du dollar canadien en 1998 (la valeur la plus basse jamais enregistrée), une majorité des visiteurs d'agrément avec hébergement américains ont également classé « la valeur obtenue par dollar » comme étant supérieure en Ontario qu'aux États-Unis. Bien que « la valeur obtenue par dollar » était le seul élément considéré meilleur en Ontario qu'aux États-Unis par les visiteurs américains, ce facteur a aussi obtenu le plus fort pourcentage de mauvaises notes (12,9 %) tandis que l'hospitalité des résidents locaux recevait la plus mauvaise note de la part des visiteurs d'agrément américains avec hébergement.

- La majorité des visiteurs d'agrément avec hébergement provenant des pays d'outre-mer ont classé l'hospitalité des résidents locaux et les services d'hébergement comme étant essentiellement au même niveau en Ontario et dans leur pays d'origine. Pour les autres services, les visiteurs des pays d'outre-mer étaient divisés en deux catégories : ceux qui considéraient que ces services étaient supérieurs en Ontario et ceux qui considéraient que ces services étaient essentiellement du même niveau. Dans l'ensemble, les visiteurs des pays d'outre-mer classaient les services de transport plus mal que les visiteurs américains, les visiteurs allemands étant ceux qui classaient le plus mal ce type de services (25,4 %).

- Les voyages d'agrément avec hébergement en Ontario ont diminué de 15,4 % durant la période 1979-1998, passant de 21,4 millions de visites en 1979 à 18,1 millions en 1998. En comparaison, le total des voyages avec hébergement en Ontario ont diminué de 7 % au cours de la même période. Le déclin le plus important des voyages d'agrément avec hébergement en Ontario a été observé en 1992, résultat de la récession économique alors en cours et d'un été exceptionnellement froid et humide (c'est la saison durant laquelle la plupart des visiteurs d'agrément voyagent en Ontario). Cependant, et depuis 1992, les voyages d'agrément avec hébergement en Ontario semblent récupérer mieux que le marché général des voyages avec hébergement. En moyenne, les visites d'agrément avec hébergement ont augmenté de 0,8 % par année durant la période 1992-1998, tandis que le total des visites avec hébergement a diminué à un taux annuel moyen de 1,08 %, principalement en raison de la diminution des voyages d'affaires.

- Le déclin des visites-personnes avec hébergement depuis 1979 est attribuable principalement au déclin des voyages d'agrément avec hébergement des résidents ontariens à l'intérieur de leur province (réduction de 24,2 % de 1979 à 1998). Les voyages d'agrément avec hébergement des visiteurs américains en Ontario ont diminué, au cours de la même période, de 1,4 %, tandis que les voyages d'agrément avec hébergement en Ontario par les visiteurs des pays d'outre-mer ont augmenté de 121,0 %, indépendamment de la crise économique que de nombreux pays d'outre-mer ont subi en 1998. En conséquence de ces taux de croissance différentiels, l'importance ontarienne dans le marché des voyages d'agrément avec hébergement à l'intérieur de la province a diminué en passant de 72,1 % en 1979 à 64,7 % en 1998; la part américaine a augmenté pour atteindre 25,3 % et la part des pays d'outre-mer a augmenté pour passer de 1,8 % en 1979 à 4,7 % en 1998.

INTRODUCTION

The information contained in this report, with the exception of the historical data, was extracted from the micro data files of the Canadian Travel Survey (CTS) and the International Travel Survey (ITS) by Research Resolutions, on behalf of the Ontario Ministry of Tourism (OMTOUR).

The historical data up to 1995 contained in this report are based on information obtained from the ITS and on revised estimates of the CTS done by OMTOUR (see Ontario's Domestic Travel Markets: 1978-1995").

Co-sponsored by all the provinces and the federal government, the CTS is conducted by Statistics Canada annually (starting in 1997) as a supplement to the Labour Force Survey. The CTS telephone interview captures the incidence and detail of travel by Canadians. In 1998, an average of 15,010 Canadian households -- including 4,276 Ontario households -- were surveyed every month throughout the year. The average response rate for Canadian and Ontario respondents was around 90%.

While up to 1994 only the name of a trip's destination was available from the CTS, as well as the name of the province where an overnight stop might have occurred en route to the trip's destination, starting in 1996 the complete trip itinerary was collected. As such, at the sub-provincial level, only visits with a destination in a specific region are comparable pre and post 1996 and not total domestic visits. In addition to the change in the location question, starting in 1996, the CTS captured the interview data on a CAI system, rather than on paper as was the case up to 1994.

The domestic data contained in this report differ from those reported in print or supplied in electronic format by Statistics Canada in the following ways:

1. All overnight trips, regardless of the distance travelled, and same day trips with a minimum one-way distance from a respondent's home of at least 40 kms are included in this report. Statistics Canada reports only trips of 80 kms and over.

2. Overnight trips with an Ontario destination, but no nights spent in the province, are treated in this report as same day trips to Ontario.

3. The domestic data contained in this report include visits in Ontario by Canadians while on trips to any destination, not just Canadian destinations.

Excluded from this report's domestic data are the following types of travel: travel as a member of an operating crew of a bus, plane, truck, etc.; commuting to and from work or school; one way travel involving a change of residence; travel in an ambulance to a hospital or clinic; trips that did not originate in Canada; and trips longer than one year. A domestic trip must also meet a distance requirement as follows:

Length of Stay	PLACE OF RESIDENCE	
	Ontario	Other Canada
Same Day	40 Kms one-way from home	80 Kms one-way from home
Overnight	No minimum distance	No minimum distance

The ITS is also conducted by Statistics Canada every year with the help of Canada Customs and Immigration authorities who essentially conduct a census of border crossings and distribute the questionnaires to a sample of travellers. The questionnaires are self-completed by the travellers and mailed back to Statistics Canada.

The international statistics presented in this report are based on the census of US and overseas visitors as far as the number of travellers, their origin and the mode of transport are concerned. Most of the remaining trip characteristics were obtained from 12,534 completed questionnaires by US residents (out of 28,450 usable questionnaires of US visitors to Canada) and 6,302 completed questionnaires by overseas visitors (out of 11,567 usable questionnaires of overseas visitors to Canada).

The data contained in this report differ from those reported in the Touriscope, or supplied electronically by Statistics Canada, primarily due to the following:

1. Statistics Canada does not allocate Canadian carrier fares to the provinces. Ontario does so based on the mode of transport and the port of entry/exit.

2. Ontario does a number of imputations for missing values.

3. Statistics Canada allocates expenditures to the provinces based on the number of nights a visitor spends in each place. Ontario distinguishes between accommodation expenditures and other expenditures. The former are distributed according to the number of nights a visitor spent in various places and according to whether or not commercial accommodation was used in each overnight stop.

For more details on how Ontario manipulates the database, please write to the address below to obtain the technical appendix.

To aid the reader, a glossary of key terms used throughout this report is appended. For more information on this publication please contact:

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ONTARIO's OVERNIGHT PLEASURE MARKET - 1998

HOW MANY PLEASURE VISITORS AND WHERE DID THEY COME FROM?

In 1998, 107 million person visits were made in Ontario by same day and overnight visitors from across Canada and around the world. Those who visited Ontario primarily for pleasure accounted for 42.4% of this total, or for 45.3 million person visits.

As was the case with the general visitor population, most of the Ontario pleasure visitors did not stay in the province overnight. However, as the pie charts indicate, pleasure visitors had a higher incidence of overnight stay than other visitors did.

Three-quarters of Ontario's overnight pleasure visitors came, in 1998, from Ontario, Michigan and New York, with Ontario accounting for 86% of these three-quarters.

Out of every twenty-one overnight pleasure visitors who visited Ontario in 1998, fourteen came from Ontario (65.7%), five from the U.S. (25.2%), one from a province other than Ontario (5.4%) and one from an overseas country (4.7%). With respect to the overnight pleasure visitors from overseas countries, out of every eight who visited Ontario in 1998, two came from the U.K. (21.8%), one from France (13.4%), and one from Japan (12.9%).

Although Metro Toronto generated 9.2% of Ontario's overnight pleasure visitors, this share was much smaller than its share of Ontario's population (22.2% in 1996), implying that its residents did not have a very high incidence of overnight pleasure travel in their own province. Among the remaining municipalities, Ottawa-Carleton generated the second largest number of overnight pleasure visits in Ontario (4.3%).

A look at Table 1 reveals that Canadians, with the exception of those living in Metro Toronto and Winnipeg, had a higher incidence of overnight non-pleasure travel to Ontario than overnight pleasure travel, while the Americans had a much higher incidence of pleasure travel to Ontario than non-pleasure travel (Americans accounted for 19.6% of all overnight visitors to Ontario, but for 25.2% of the province's overnight pleasure visitors). The table also reveals that the overwhelming majority of Ontario's overnight visitors from Taiwan, China and South Korea came to the province for reasons other than those associated with a pleasure trip.

TABLE 1: Overnight Person Visits in Ontario: 1998

Origin of Visitors (000's)	All Visitors	Share (%)	Pleasure Visitors	Share (%)
CANADA	30,317	75.7	12,688	70.1
ONTARIO	27,054	67.6	11,715	64.7
Metro Toronto	3,551	8.9	1,672	9.2
Ottawa-Carleton RM	2,275	5.7	786	4.3
St. Catharines-Niagara	628	1.6	277	1.5
Windsor	637	1.6	265	1.5
QUEBEC	1,691	4.2	471	2.6
Montreal	1,175	2.9	298	1.6
Quebec City	74	0.2	26	0.1
MANITOBA	474	1.2	241	1.3
Winnipeg	404	1.0	216	1.2
ATLANTIC CANADA	361	0.9	90	0.5
Halifax	97	0.2	23	0.1
WESTERN CANADA	737	1.8	168	0.9
Vancouver	246	0.6	57	0.3
Calgary	132	0.3	40	0.2
Edmonton	82	0.2	8	*
Regina	28	0.1	6	*
Saskatoon	24	0.1	9	*
USA	7,860	19.6	4,573	25.2
Michigan	1,678	4.2	989	5.5
New York	1,511	3.8	949	5.2
Ohio	719	1.8	514	2.8
Pennsylvania	458	1.1	319	1.8
Illinois	396	1.0	218	1.2
Minnesota	310	0.8	206	1.1
Wisconsin	283	0.7	214	1.2
California	212	0.5	74	0.4
New Jersey	197	0.5	84	0.5
Massachusetts	148	0.4	48	0.3
Florida	143	0.4	48	0.3
OVERSEAS	1,866	4.7	850	4.7
UK	388	1.0	185	1.0
Japan	208	0.5	110	0.6
France	166	0.4	114	0.6
Germany	152	0.4	85	0.5
Hong Kong	62	0.2	29	0.2
Italy	61	0.2	29	0.2
Australia	58	0.1	26	0.1
Mexico	52	0.1	20	0.1
Netherlands	49	0.1	19	0.1
Taiwan	43	0.1	12	0.1
China	38	0.1	6	*
South Korea	34	0.1	8	*
India	33	0.1	16	0.1
Israel	32	0.1	10	0.1
Switzerland	28	0.1	15	0.1
Brazil	28	0.1	19	0.1

*Less than 0.1%.

HOW LONG DID THEY STAY IN ONTARIO?

Overall, Ontario's overnight visitors, as well as its overnight pleasure visitors, spent 3.15 nights in the province in 1998. As expected, overseas overnight visitors stayed the longest (with UK and Germany having the longest lengths of stay among overseas countries), followed by Americans and Canadians.

Overnight pleasure visitors from Canada stayed longer in Ontario than other Canadian overnight visitors, while for Americans and overseas visitors the opposite was true. Overnight overseas visitors who came to Canada in 1998 for the purpose of visiting their friends or relatives stayed in Ontario twice as long (12.7 nights) as overnight pleasure visitors from these countries.

TABLE 2: Overnight Visitors by Length of Stay in Ontario

Origin of Visitors	Average Number of Nights	
	All Visitors	Pleasure Visitors
Canada	2.83	2.96
Ontario	2.63	2.89
USA	3.11	3.05
Border States	2.84	2.88
Overseas	8.44	6.59
UK	8.74	7.52
France	5.58	4.35
Germany	8.74	8.12
Japan	3.18	2.26

Close to two-thirds (62%) of Ontario's overnight pleasure visitors stayed in the province for two nights or less and 77% stayed for three nights or less. Only 4% of Ontario's overnight pleasure visitors stayed in the province for ten or more nights.

Ontarians on an overnight pleasure trip in Ontario had the highest incidence (81%) of taking a short getaway trip (3 nights or less) in the province, followed by Americans (78%) and finally overseas visitors (43%). In

general, the further away a visitor to Ontario came from, the longer he/she stayed in the province.

The relationship between the proximity of a visitor's residence to Ontario and this visitor's length of stay in the province is also evident when tables 1 and 3 are compared. With a few minor exceptions, these tables show that the nearer a region is to Ontario, the smaller its share of person nights and the larger its share of person visits.

Overnight pleasure visitors generated 57.1 million of person nights in Ontario, or 45% of the total nights generated in the province by all overnight visitors.

Table 1 uses overnight person visits as the yardstick for ranking the various markets in terms of their importance to Ontario. However, if the number of person nights generated from each origin is used as the yardstick for ranking each market, then, as Table 3 shows, some significant changes are observed. For example, California becomes a more important market than Wisconsin and Florida becomes more important than New Jersey and Massachusetts.

Among the overseas countries, Germany becomes more important than France and Japan, and France becomes more important than Japan. Furthermore, Taiwan rises from the 10th position, among overseas countries, to the 5th position.

The ranking of the various markets changes further when pleasure nights are used as the yardstick for measuring their importance to Ontario. For example, given California's low incidence of pleasure travel to Ontario, its position changes from the 7th most important U.S. state to the 9th most important U.S. state, overtaken by Wisconsin and Florida.

TABLE 3: Person Nights to Ontario by Origin, 1996

Origin of Visitors (000's)	All Visitors	Share (%)	Pleasure Visitors	Share (%)
CANADA	85,947	68.1	37,574	65.8
ONTARIO	71,199	56.4	33,857	59.3
Metro Toronto	9,371	7.4	4,277	7.8
Ottawa-Carleton RM	6,075	4.8	2,035	3.6
Windsor	1,975	1.6	1,124	2.0
St. Catharines-Niagara	1,871	1.5	931	1.6
QUEBEC	4,738	3.8	1,543	2.7
Montreal	3,274	2.6	1,017	1.8
Quebec City	242	0.2	78	0.1
MANITOBA	1,989	1.6	882	1.5
Winnipeg	1,587	1.3	764	1.3
ATLANTIC CANADA	2,421	1.9	466	0.8
Halifax	587	0.5	93	0.2
WESTERN CANADA	5,600	4.4	825	1.4
Vancouver	1,459	1.2	229	0.4
Calgary	967	0.8	157	0.3
Edmonton	682	0.5	25	*
Regina	221	0.2	90	0.2
Saskatoon	165	0.1	49	0.1
USA	24,449	19.4	13,929	24.4
Michigan	4,068	3.2	2,496	4.4
New York	4,015	3.2	2,592	4.5
Ohio	2,068	1.6	1,349	2.4
Pennsylvania	1,654	1.3	1,154	2.0
Illinois	1,334	1.1	746	1.3
Minnesota	1,100	0.9	731	1.3
California	1,012	0.8	357	0.6
Wisconsin	985	0.8	737	1.3
Florida	855	0.7	402	0.7
New Jersey	638	0.5	290	0.5
Massachusetts	457	0.4	161	0.3
OVERSEAS	15,744	12.5	5,601	9.8
UK	3,386	2.7	1,394	2.4
Germany	1,325	1.1	691	1.2
France	926	0.7	495	0.9
Japan	663	0.5	247	0.4
Taiwan	575	0.5	307	0.5
Netherlands	566	0.4	226	0.4
Italy	552	0.4	205	0.4
Australia	469	0.4	129	0.2
China	457	0.4	37	0.1
Hong Kong	393	0.3	139	0.2
India	321	0.3	120	0.2
South Korea	298	0.2	45	0.1
Mexico	295	0.2	113	0.2
Israel	253	0.2	32	0.1
Switzerland	213	0.2	121	0.2
Brazil	178	0.1	108	0.2

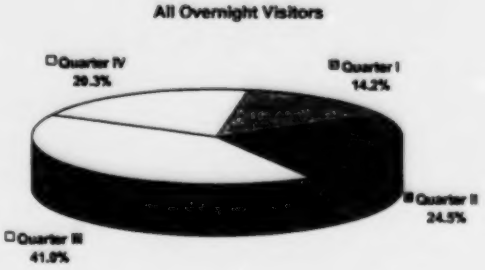
Among the overseas countries, Japan falls further behind overtaken by Taiwan, while China, South Korea and Israel fall to the bottom of the overseas list.

WHEN DID THEY VISIT ONTARIO?

Compared to other overnight visitors, overnight pleasure visitors had a much higher incidence of travel during the summer and a much lower incidence of travel during the winter and fall.

The majority (53%) of Ontario's overnight pleasure visitors travelled in the province during the July-September period (3rd quarter). This observation held across most of Ontario's main markets, with the exception of the U.S. border states as a whole, U.K. and Japan (although the largest proportion of pleasure visitors from these three regions came to Ontario during the summer, this proportion did not constitute a majority).

Among Ontario's main overnight pleasure markets, Ontarians had the highest incidence of travel in Ontario during the first calendar quarter (11%), Japanese and U.K. visitors had the highest incidence of travel during the second quarter (32%), French visitors had the highest incidence of travel during the third calendar quarter (65%) and German visitors had the highest incidence of travel during the fourth calendar quarter (19%). As Table 4 indicates, overseas and U.S. overnight pleasure visitors accounted for a higher proportion of Ontario's overnight pleasure visitors during the second and fourth calendar quarters, while Canadians accounted for a larger proportion during the first and third calendar quarters.



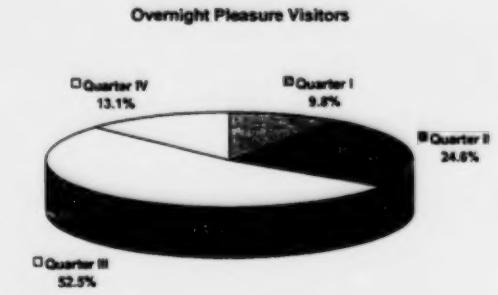


TABLE 4: Overnight Pleasure Visits to Ontario by Calendar Quarter, 1998

Origin of Visitors	QI	QII	QIII	QIV
TOTAL	1,771	4,454	9,509	2,378
CANADA (000)	1,361	3,054	6,720	1,553
Share (%)	*76.8*	*68.6*	*70.7*	*65.3*
Ontario	1,280	2,850	6,147	1,439
Share (%)	*72.2*	*64.0*	*64.6*	*60.5*
USA (000)	363	1,158	2,352	701
Share (%)	*20.5*	*26.0*	*24.7*	*29.5*
Border States	341	820	1,660	588
Share (%)	*19.3*	*18.4*	*17.5*	*24.7*
OVERSEAS (000)	47	242	437	124
Share(%)	*2.7*	*5.4*	*4.6*	*5.2*
UK	10	59	86	30
Share (%)	*0.6*	*1.3*	*0.9*	*1.3*
France	2	26	74	12
Share (%)	*0.1*	*0.6*	*0.8*	*0.5*
Germany	4	19	47	16
Share(%)	*0.2*	*0.4*	*0.5*	*0.7*
Japan	9	35	54	11
Share(%)	*0.5*	*0.8*	*0.6*	*0.5*

Some significant differences in the habits of overnight pleasure visitors travelling during different calendar quarters were observed and presented in Table 5. The majority of the overnight pleasure visitors who were visiting Ontario during the first and fourth calendar quarters stayed in commercial roofed accommodation, while the majority of those travelling in Ontario during the second and third quarters stayed in non-commercial accommodation and campgrounds.

The first and fourth quarters also received the largest share of overnight pleasure visitors who stayed at the homes of friends or relatives, while the third quarter received the largest share of overnight pleasure visitors who stayed at a private cottage.

Because a much higher proportion of the

overnight pleasure visitors who visited Ontario during the first and fourth quarters used commercial roofed accommodation, the average spending per overnight pleasure visitor-per night was much higher during the first and fourth quarters than it was during the second and third quarters.

TABLE 5: Overnight Pleasure Visitors in Ontario by Calendar Quarter, 1998

	QI	QII	QIII	QIV
% of overnight pleasure visitors using commercial roofed accommodation	60.7%	37.8%	38.3%	57.9%
% of overnight pleasure visitors using hotels	42.0%	22.3%	20.4%	39.2%
% of overnight pleasure visitors using the homes of friends or relatives	16.7%	11.6%	10.8%	15.9%
% of overnight pleasure visitors using private cottages	20.9%	24.5%	26.9%	19.3%
% of overnight pleasure visitors using campgrounds or trailer parks	0.7%	21.8%	22.0%	4.1%
Average length of stay in Ontario of overnight pleasure visitors (nights)	2.21	2.78	3.59	2.83
% of overnight pleasure visitors' spending, by quarter	8.6%	22.9%	52.5%	16.0%
Average spending per overnight pleasure visitor	$185	$196	$210	$256
Average spending per overnight pleasure visitor per night	$84	$71	$58	$90

On the other hand, average spending per overnight pleasure visit was lower in the first quarter than it was in the second, third and fourth quarters because the average length of stay during the first quarter was lower.

The majority of the overnight pleasure visitors from overseas countries and the U.S. stayed in commercial roofed accommodation irrespective of the calendar quarter, while the majority of overnight pleasure visitors from Canada stayed in commercial roofed accommodation only during the first quarter.

HOW DID THEY TRAVEL WHILE IN CANADA?

While in Canada, the overwhelming majority of Ontario's overnight pleasure visitors (87.8%) used the automobile to travel to Ontario destinations. The automobile was followed in popularity by the bus (6.3%), the plane (3.1%) and the train (2.4%).

As expected, Canadian visitors had the highest incidence of automobile use (94.2%), followed by the Americans (75.5%). Compared to Canadians and Americans, overnight pleasure visitors from overseas countries had a much higher incidence of bus (38.4%), plane (19.6%) and train (14.1%) utilisation while in Canada.

WHAT WAS THE SIZE AND COMPOSITION OF THEIR TRAVELLING PARTY?

Although most of the overnight pleasure visitors in Ontario travelled in groups of two or more persons (62.0%), a sizeable group travelled alone (38.0%). The incidence of travelling with no companions was the lowest among American and French overnight pleasure visitors (only 13.1% of the Americans and 11.6% of the French overnight pleasure visitors travelled alone in Ontario) and the highest among Canadians (45.2%). Eight out of every ten travel parties (80.3%) who were visiting Ontario while on an overnight pleasure trip travelled in groups comprised of adults only, and about two-in-ten (19.7%) travelled with children under the age of 15. Of those travelling in adult parties, 47.4% travelled in groups comprised of one adult, 44.9% travelled in groups comprised of two adults and 7.7% in groups comprised of three or more adults.

M121

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TABLE 6: Overnight Party Visits in Ontario
Main Purpose Pleasure - 1998

Origin of Visitors	Average Party Size (persons)	Party Composition	
		Adults Only (%)	Adults with Kids (%)
CANADA	2.0	79.2	20.8
Ontario	2.0	78.8	21.2
USA	2.5	83.1	16.9
Border States	2.5	82.4	17.6
OVERSEAS	2.2	88.8	11.2
UK	2.2	91.2	8.8
France	2.0	89.1	10.9
Germany	2.2	91.8	8.2
Japan	2.2	89.9	10.1

The incidence of travel in groups comprised of two adults only was the highest among UK, French and German visitors (63.5%, 60.8% and 59.5%, respectively, of all the overnight pleasure visitors from these countries travelled in groups of two adults).

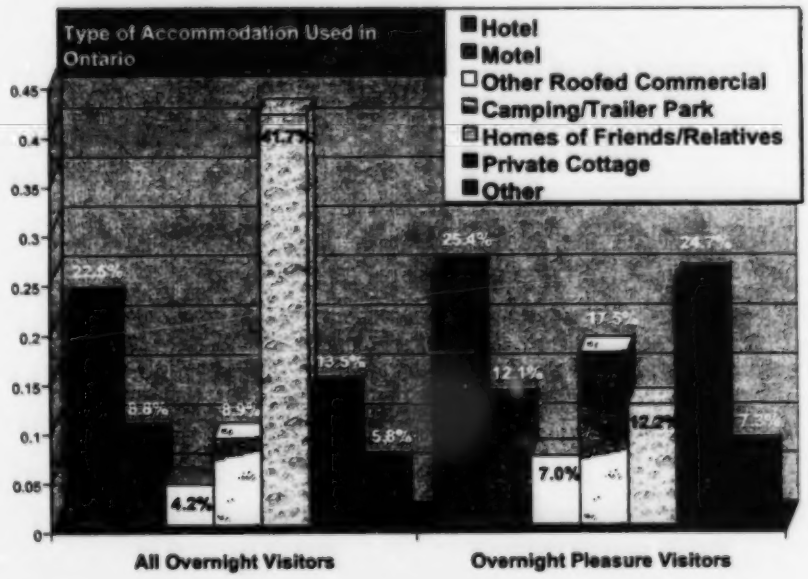
Relative to other groups, Ontarians and other Canadians, had a low incidence of travel in groups comprised of two adults only (29.9% and 33.8%, respectively) and the highest incidence of travelling alone (45.0% and 47.2%, respectively), while Ontarians had the highest incidence of travelling with children (21.2%).

Overnight pleasure visitors travelling in parties comprised of adults only generated 79.7% of the party nights spent in Ontario in 1998. Since this share is slightly lower than their corresponding share of party visits, this implies that travelling parties with children stayed longer in Ontario than travelling parties with adults only. This was especially true for overnight pleasure visitors from Ontario, other Canadian provinces, the U.S., Germany and Japan. A consequence of the longer length of stay of parties with children was the fact that although these visitors accounted for 19.7% of Ontario's overnight pleasure parties, they accounted for 20.8% of the total expenditures incurred by overnight pleasure visitors in Ontario, rendering them a higher yield market segment than those travelling in adults-only parties.

WHAT TYPE OF ACCOMMODATION DID THEY USE?

Compared to other overnight visitors, overnight pleasure visitors had a much higher incidence of utilisation of roofed commercial accommodation (42.9% vs. 34.5%) and consequently a lower usage of non-commercial accommodation (36.8% vs. 55.0%). They also had a much higher incidence of utilization of camping/trailer parks (17.5% vs. 8.9%).

These observations varied considerably among overnight pleasure visitors from different origins. For



example, only 31.0% of the Canadian overnight pleasure visitors used roofed commercial accommodation, 21.1% used campgrounds and 46.1% used non-commercial accommodation, such as the homes of friends/relatives or private cottages. On the other hand, 70.5% of the overnight pleasure visitors from the U.S. used commercial roofed accommodation, 9.9% used campgrounds and only 13.2% used homes of friends or relatives, or private cottages.

Type of Accommodation	Canada	Ontario	USA	Overseas
Hotel	1.92	1.77	2.09	3.48
Motel	1.89	1.80	1.85	2.43
Other roofed commercial	3.55	3.53	5.46	3.71
Camping/trailer park	3.16	3.14	2.94	6.89
Any roofed commercial	2.25	2.15	2.65	3.65
Any non-commercial	3.15	3.07	3.93	10.05

Overnight pleasure visitors from overseas countries had the highest incidence of utilisation of commercial roofed accommodation (73%) and the lowest incidence of utilisation of campgrounds (4%).

Overnight pleasure visitors from overseas countries who stayed in the homes of their friends or relatives, or in private cottages had the highest average length of stay in Ontario, followed by overnight pleasure visitors from overseas countries who used campgrounds and Americans who used a commercial roofed accommodation other than a hotel or a motel (such as commercial cottage, resort, bed and breakfast). Hotels and motels had the lowest average length of stay irrespective of the visitor's origin. As such, although hotels accounted for 25.4% and motels for 12.1% of Ontario's overnight pleasure visitors, these two types of accommodation only accounted for 17.4% and 7.4%, respectively, of the nights spent in the province by overnight pleasure visitors.

WHAT DID THEY DO IN ONTARIO?

Overnight pleasure visitors were more active than other overnight visitors participating, on average, in 2.42 of the activities listed in Table 8, as opposed to 2.12 for the overall overnight visitors.

Outdoor activities were by far the most popular among Ontario's overnight pleasure visitors (55.6%), followed by sightseeing (42.0%) and shopping (39.4%). Outdoor activities, visiting parks/historic sites and sightseeing were the activities that truly differentiated overnight pleasure visitors from other overnight visitors.

Ontarians and other Canadians who visited the province on an overnight pleasure trip were much more inclined to participate in outdoor activities than the corresponding

Activity (000's)	All Visitors	Share %	Pleasure Visitors	Share %
Visit Friends/ Relatives	22,742	56.8	5,990	33.1
Attend Festivals/Fairs	1,975	4.9	1,177	6.5
Attend Cultural Events	5,285	13.2	3,410	18.8
Attend Sports Events	2,395	6.0	1,530	8.4
Shopping	13,876	34.7	7,136	39.4
Sightseeing	11,844	29.6	7,614	42.0
Nightlife/Entertainment	4,263	10.6	1,937	10.7
Visit Theme Parks	1,502	3.8	1,016	5.6
Visit Parks or Historic Sites	5,608	14.0	3,998	22.1
Participate in Outdoor Activities	15,251	38.1	10,075	55.6

TABLE 6: Overnight Party Visits in Ontario Main Purpose Pleasure, 1998			
Origin of Visitors	Average Party Size (persons)	Party Composition	
		Adults Only (%)	Adults with Kids (%)
CANADA	2.0	79.2	20.8
Ontario	2.0	78.8	21.2
USA	2.5	83.1	16.9
Border States	2.5	82.4	17.6
OVERSEAS	2.2	88.8	11.2
UK	2.2	91.2	8.8
France	2.0	89.1	10.9
Germany	2.2	91.8	8.2
Japan	2.2	89.9	10.1

The incidence of travel in groups comprised of two adults only was the highest among UK, French and German visitors (63.5%, 60.8% and 59.5%, respectively, of all the overnight pleasure visitors from these countries travelled in groups of two adults).

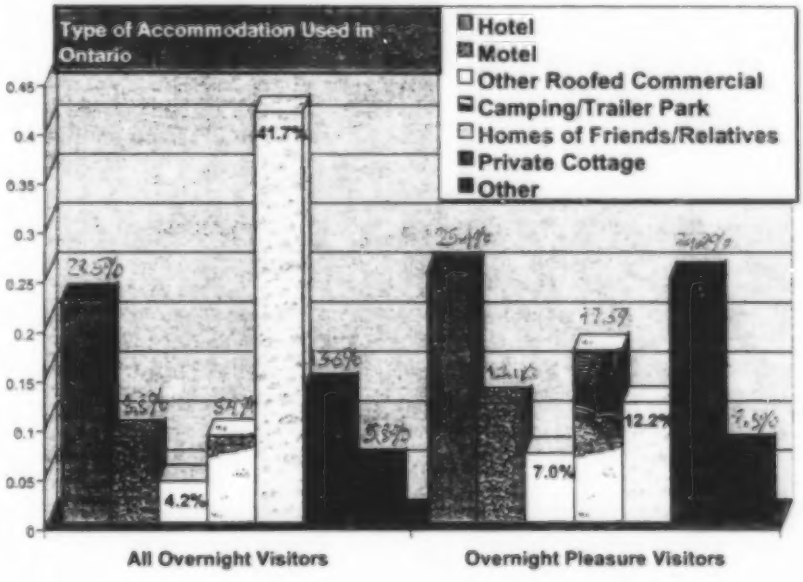
Relative to other groups, Ontarians and other Canadians, had a low incidence of travel in groups comprised of two adults only (29.9% and 33.8%, respectively) and the highest incidence of travelling alone (45.0% and 47.2%, respectively), while Ontarians had the highest incidence of travelling with children (21.2%).

Overnight pleasure visitors travelling in parties comprised of adults only generated 79.7% of the party nights spent in Ontario in 1998. Since this share is slightly lower than their corresponding share of party visits, this implies that travelling parties with children stayed longer in Ontario than travelling parties with adults only. This was especially true for overnight pleasure visitors from Ontario, other Canadian provinces, the U.S., Germany and Japan. A consequence of the longer length of stay of parties with children was the fact that although these visitors accounted for 19.7% of Ontario's overnight pleasure parties, they accounted for 20.8% of the total expenditures incurred by overnight pleasure visitors in Ontario, rendering them a higher yield market segment than those travelling in adults-only parties.

WHAT TYPE OF ACCOMMODATION DID THEY USE?

Compared to other overnight visitors, overnight pleasure visitors had a much higher incidence of utilisation of roofed commercial accommodation (42.9% vs. 34.5%) and consequently a lower usage of non-commercial accommodation (36.8% vs. 55.0%). They also had a much higher incidence of utilization of camping/trailer parks (17.5% vs. 8.9%).

These observations varied considerably among overnight pleasure visitors from different origins. For



example, only 31.0% of the Canadian overnight pleasure visitors used roofed commercial accommodation, 21.1% used campgrounds and 46.1% used non-commercial accommodation, such as the homes of friends/relatives or private cottages. On the other hand, 70.5% of the overnight pleasure visitors from the U.S. used commercial roofed accommodation, 9.9% used campgrounds and only 13.2% used homes of friends or relatives, or private cottages. Overnight pleasure visitors from overseas countries had the highest incidence of utilisation of commercial roofed accommodation (73%) and the lowest incidence of utilisation of campgrounds (4%).

TABLE 7: Overnight Pleasure Visitors in Ontario
Average Number of person Nights by Accommodation Type, 1998

Type of Accommodation	Canada	Ontario	USA	Overseas
Hotel	1.92	1.77	2.09	3.48
Motel	1.89	1.80	1.85	2.43
Other roofed commercial	3.55	3.53	5.46	3.71
Camping/trailer park	3.16	3.14	2.94	6.89
Any roofed commercial	2.25	2.15	2.65	3.65
Any non-commercial	3.15	3.07	3.93	10.05

Overnight pleasure visitors from overseas countries who stayed in the homes of their friends or relatives, or in private cottages had the highest average length of stay in Ontario, followed by overnight pleasure visitors from overseas countries who used campgrounds and Americans who used a commercial roofed accommodation other than a hotel or a motel (such as commercial cottage, resort, bed and breakfast). Hotels and motels had the lowest average length of stay irrespective of the visitor's origin. As such, although hotels accounted for 25.4% and motels for 12.1% of Ontario's overnight pleasure visitors, these two types of accommodation only accounted for 17.4% and 7.4%, respectively, of the nights spent in the province by overnight pleasure visitors.

WHAT DID THEY DO IN ONTARIO?

Overnight pleasure visitors were more active than other overnight visitors participating, on average, in 2.42 of the activities listed in Table 8, as opposed to 2.12 for the overall overnight visitors.

Outdoor activities were by far the most popular among Ontario's overnight pleasure visitors (55.6%), followed by sightseeing (42.0%) and shopping (39.4%). Outdoor activities, visiting parks/historic sites and sightseeing were the activities that truly differentiated overnight pleasure visitors from other overnight visitors.

Ontarians and other Canadians who visited the province on an overnight pleasure trip were much more inclined to participate in outdoor activities than the corresponding

TABLE 8: Overnight Visitors in Ontario
Activities Participated in During the Trip, 1998

Activity (000's)	All Visitors	Share %	Pleasure Visitors	Share %
Visit Friends/ Relatives	22,742	56.8	5,990	33.1
Attend Festivals/Fairs	1,975	4.9	1,177	6.5
Attend Cultural Events	5,285	13.2	3,410	18.8
Attend Sports Events	2,395	6.0	1,530	8.4
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Visit Parks or Historic Sites	5,608	14.0	3,998	22.1
Participate in Outdoor Activities	15,251	38.1	10,075	55.6

TABLE 9: Overnight Pleasure Visitors to Ontario Percent of Visitors Who Participated in Selected Activities, 1998				
	Origin of Overnight Pleasure Visitors			
	Canada	Ontario	USA	Overseas
Visit Friends/Relatives	38.5%	37.5%	16.3%	43.0%
Attend Festivals/Fair	5.9%	5.2%	7.4%	10.9%
Attend Cultural Events	10.6%	9.0%	34.5%	57.2%
Attend Sports Events	9.4%	9.3%	5.6%	10.2%
Shopping	28.2%	27.1%	62.3%	83.7%
Sightseeing	31.8%	30.1%	61.4%	90.6%
Nightlife/Entertainment	7.3%	6.8%	17.5%	24.0%
Visit Theme Parks	4.3%	3.5%	6.2%	22.1%
Visit Parks or Historic Sites	12.6%	11.8%	40.7%	63.9%
Participate in Outdoor Activities	64.6%	66.0%	36.2%	25.6%

American or overseas overnight pleasure visitors (66.0% of Ontarians did so as opposed to 36.2% of Americans and 25.6% of overseas overnight pleasure visitors).

On the other hand, Americans and overseas visitors on an overnight pleasure trip to Ontario were much more inclined to go sightseeing, to go shopping, to attend cultural events, to visit parks or historic sites and to participate in nightlife/entertainment. Surprisingly, overnight pleasure visitors from overseas countries had the highest incidence of visiting friends or relatives and the highest incidence of visiting a theme park (the latter is surprising because overnight pleasure visitors from overseas countries had the lowest incidence of travel with children under the age of 15).

Overnight pleasure visitors from overseas countries were the most active in Ontario participating, on average, in 4.88 activities, while those from the U.S. and Ontario participated, on average, in 2.88 and 2.06 activities, respectively.

The types of activities that overnight pleasure visitors from different origins engaged in imply that Ontario's overnight international pleasure visitors had, in 1998, a more urban orientation than its domestic overnight pleasure visitors.

TABLE 10: Overnight Visitors in Ontario Average Spending in Ontario by Activity Group, 1998		
Activity	Average Spending per Visitor	
	All Visitors	Pleasure Visitors
Visit Friend or Relative	$171	$195
Attend Festivals/Fairs	$369	$319
Attend Cultural Events	$469	$397
Attend Sports Events	$347	$264
Shopping	$369	$323
Sightseeing	$376	$315
Nightlife/Entertainment	$471	$413
Visit Theme Parks	$440	$363
Visit Parks or Historic Sites	$410	$338
Participate in Outdoor Activities	$189	$170

When the average spending of the various activity groups is compared across overnight pleasure visitors and other overnight visitors (Table 10), we observe that irrespective of the activity group, overnight pleasure visitors had a lower average spending than other overnight visitors (ranging from 10% less for those who participated in outdoor activities to 24% less for those who attended cultural events), with the exception of those who visited friends or relatives. This is so because the category "other overnight visitors" includes a portion of overnight business visitors who, in turn, spend much more per visit than any other visitor. Visiting friends and relatives is an exception because this is not an activity that many business visitors engage in. For example, only 4.1% of Ontario's overnight business visitors visited their friends or relatives, while 18.6%

TABLE 11: Overnight Pleasure Visitors in Ontario
Average Spending in Ontario by Activity Group and Origin, 1998

	Origin of Overnight Pleasure Visitors			
	Canada	Ontario	USA	Overseas
Visit Friends/Relatives	$121	$110	$294	$974
Attend Festivals/Fair	$192	$175	$453	$858
Attend Cultural Events	$251	$239	$354	$942
Attend Sports Events	$166	$151	$405	$1,178
Shopping	$194	$180	$337	$915
Sightseeing	$201	$188	$323	$880
Night-life/ Entertainment	$307	$303	$389	$995
Visit Theme Parks	$224	$208	$261	$923
Visit Parks/Historic Sites	$201	$183	$294	$889
Participate in Outdoor Activities	$112	$108	$349	$981

participated in nightlife or entertainment and 8.2% attended a cultural event.

Within the overnight pleasure group, those who engaged in nightlife or entertainment had the highest average spending per person visit than any other activity group ($471), followed by cultural visitors ($469) and visitors who visited theme parks ($440).

As expected, overnight pleasure visitors from overseas countries had the highest per visitor spending in Ontario than any other overnight pleasure visitor. Among the overnight pleasure visitors from overseas countries, those who attended sports events had the highest average spending, followed by those who participated in nightlife/entertainment and those who participated in outdoor activities. However, it is interesting to note in Table 11 that the overnight pleasure visitors from overseas countries who visited friends or relatives were the fourth highest yield activity group among all activity groups from all origins. This was so because, as we showed earlier, these visitors stayed in Ontario longer than any other overnight pleasure sub-group.

TABLE 12: Overnight Pleasure Visitors in Ontario
Total Spending in Ontario by Activity Group and Origin, 1998

	Origin of Overnight Pleasure Visitors				
Activity	Total	Canada	Ontario	USA	Overseas
Visit Friends/Relatives	$1,166,358	$591,165	$482,253	$218,637	$356,556
Attend Festivals/Fair	$375,837	$143,283	$107,339	$152,722	$79,832
Attend Cultural Events	$1,354668	$337,380	$252,283	$559,665	$457,623
Attend Sports Events	$403,410	$197,345	$164,626	$103,586	$102,479
Shopping	$2,306,000	$695,298	$571,633	$960,387	$650,315
Sightseeing	$2,395,778	$812,384	$661,335	$905,918	$677,476
Night-life/ Entertainment	$800,684	$285,915	$242,081	$311,801	$202,968
Visit Theme Parks	$369,218	$122,070	$85,651	$73,657	$173,491
Visit Parks/Historic Sites	$1,350768	$320,495	$253,237	$547,687	$482,586
Participate in Outdoor Activities	$1,709,136	$916,870	$838,502	$578,306	$213,960
Total Spending of Overnight Pleasure Visitors	$3,805,151	$1,606,972	$1,400,289	$1,452,395	$745,784

From a marketing perspective, the average spending per person visit indicates the value that Ontario will receive by attracting one more visitor from a particular market segment. Although this value may provide some guidance for niche marketing programs, a high average spending per visitor does not necessarily imply a high importance for a particular market segment. The importance of a particular market segment is

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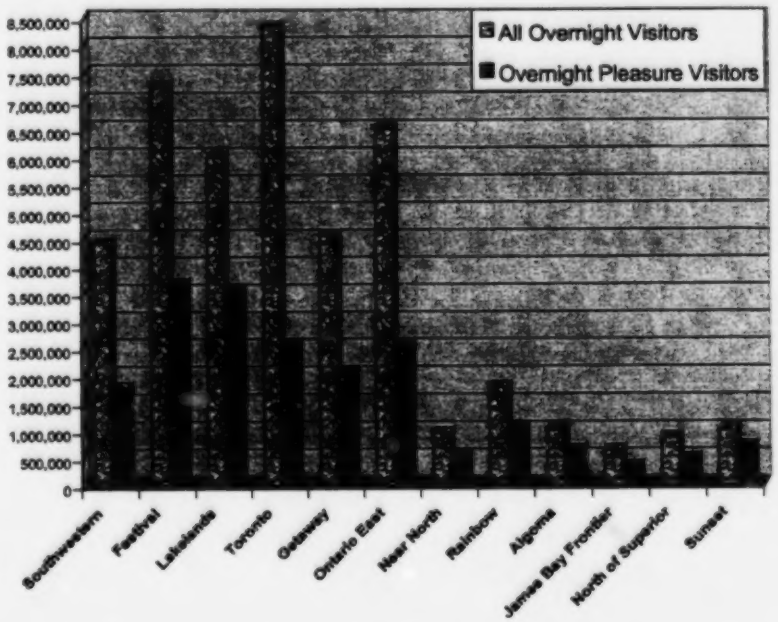
determined by the total contribution that this market segment makes to Ontario's tourism revenues – a value that is obtained by not only looking at average per visitor spending, but also at the total number of visitors comprising a particular market segment. This is done in Table 12.

As can be seen in Table 12, the most important market segments are not the high yield ones, but rather the U.S. shoppers, the U.S. overnight pleasure visitors who, among other things, went sightseeing and the Ontario outdoor enthusiasts, although as noted earlier these market segments, and especially the outdoor enthusiasts from Ontario, are not among the high yield segments.

WHICH ONTARIO REGIONS DID THEY VISIT?

Although Metro Toronto was the top region visited among all overnight visitors, accounting for 20.8% of them, it was Festival Country that rose to the top of the places visited by overnight pleasure visitors (20.2%), followed by Lakelands (19.4%). Metro Toronto was almost tied in the third place with Ontario East, each one accounting for 14.1% of Ontario's overnight pleasure visitors.

As indicated earlier, given the outdoor nature of the overnight pleasure visitors, travel regions that offered more of an outdoor product (such as Ontario's northern regions, Lakelands and even Festival Country) faired better among this group of visitors than among other overnight visitors.



Metro Toronto was the most popular region among overnight pleasure visitors from overseas countries, the second most popular region among American overnight pleasure visitors (shopping, cultural events and nightlife being the main attractions for the Americans) and the seventh most popular region among Ontario residents (who favoured Lakelands). These observations point out again to the urban/rural split between Ontario's international and domestic visitors.

Festival Country was the most popular region among overnight pleasure visitors from the U.S. and second in popularity among the overnight pleasure visitors from overseas countries - a result largely attributable to the draw of the Niagara Falls and, since 1998, the casino. For the Japanese pleasure visitors Festival Country was the top Ontario region visited, surpassing Toronto. This is not surprising given the fact that a large number of Japanese visitors come to Ontario through the United States.

As was the case with Metro Toronto, Festival Country did not fair very well among domestic visitors. It was rather the regions of Lakelands and Getaway Country that were the most popular among the domestic overnight pleasure visitors.

Ontario East was the second most popular region for overnight pleasure visitors from France (partly because the vast majority of Ontario's French visitors come to the province through Quebec), while overnight pleasure visitors from Germany had the highest incidence of visitation of Ontario's northern travel regions – an incidence even higher than that of domestic visitors.

Region Visited	Percent of Overnight Pleasure Visitors, by Origin, Visiting each Ontario Travel Region*								
	Canada	Ontario	USA	Border States	Overseas	UK	France	Germany	Japan
Southwestern Ontario	8.3%	8.8%	14.9%	17.7%	3.4%	4.0%	0.3%	4.8%	0.0%
Festival Country	12.6%	12.8%	37.5%	36.4%	41.1%	43.5%	38.2%	40.7%	54.5%
Lakelands	25.9%	27.7%	3.7%	4.3%	8.5%	10.0%	3.9%	20.7%	0.0%
Metro Toronto	8.5%	6.4%	19.4%	17.6%	71.3%	74.8%	81.5%	67.6%	42.9%
Getaway Country	14.8%	15.8%	2.9%	2.1%	5.2%	6.6%	4.1%	8.2%	1.4%
Ontario East	13.7%	12.3%	11.8%	10.1%	33.0%	27.6%	63.4%	41.4%	13.1%
Near North	3.2%	3.4%	1.8%	1.5%	2.6%	1.1%	1.6%	10.8%	0.0%
Rainbow Country	7.0%	7.5%	2.2%	2.2%	2.6%	1.6%	0.0%	12.9%	0.0%
Algoma Country	1.9%	1.9%	8.3%	8.7%	1.8%	1.4%	0.0%	6.2%	3.2%
James Bay Frontier	2.4%	2.5%	0.6%	0.7%	0.2%	0.2%	0.0%	1.7%	0.0%
North Of Superior	2.1%	2.1%	4.2%	2.8%	1.8%	0.7%	0.0%	4.8%	3.0%
Sunset Country	3.0%	1.4%	6.7%	6.3%	0.5%	0.3%	0.0%	0.3%	0.0%

* The percentages are based on the total number of visitors with a known regional destination in Ontario.
Note: The sum of each column is greater than 100% because visitors visit multiple locations in a given trip

Sunset Country had the highest proportion of overnight pleasure visitors from outside Ontario (76.6%), mainly because of the visitors from the U.S. and Manitoba. Metro Toronto had the second highest proportion of overnight pleasure visitors from outside Ontario (70.6%) primarily due to the U.S. and overseas countries, but also due to visitors from Canadian provinces other than Ontario. Finally, Algoma had the third highest proportion of overnight pleasure visitors from outside Ontario (64.7%), mainly due to visitors from the United States.

Overnight pleasure visitors from overseas countries moved around the province much more than overnight pleasure visitors from other origins, visiting on average 1.69 Ontario travel regions. American overnight pleasure visitors visited, on average, 1.14 travel regions and Canadians 1.03 travel regions. These observations seem to validate the data presented earlier on activities which showed that overnight pleasure visitors from overseas countries had the highest incidence of participation in sightseeing (90.6%), followed by Americans.

As was the case with Metro Toronto, Festival Country did not fair very well among domestic visitors. It was rather the regions of Lakelands and Getaway Country that were the most popular among the domestic overnight pleasure visitors.

Ontario East was the second most popular region for overnight pleasure visitors from France (partly because the vast majority of Ontario's French visitors come to the province through Quebec), while overnight pleasure visitors from Germany had the highest incidence of visitation of Ontario's northern travel regions – an incidence even higher than that of domestic visitors.

TABLE 13: Overnight Pleasure Visitors to Ontario by Origin and Region Visited, 1996

Region Visited	Percent of Overnight Pleasure Visitors, by Origin, Visiting each Ontario Travel Region*								
	Canada	Ontario	USA	Border States	Overseas	UK	France	Germany	Japan
Southwestern Ontario	8.3%	8.8%	14.9%	17.7%	3.4%	4.0%	0.3%	4.8%	0.0%
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Metro Toronto	8.5%	6.4%	19.4%	17.6%	71.3%	74.8%	81.5%	67.6%	42.9%
Getaway Country	14.8%	15.8%	2.9%	2.1%	5.2%	6.6%	4.1%	8.2%	1.4%
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North Of Superior	2.1%	2.1%	4.2%	2.8%	1.8%	0.7%	0.0%	4.8%	3.0%
Sunset Country	3.0%	1.4%	6.7%	6.3%	0.5%	0.3%	0.0%	0.3%	0.0%

* The percentages are based on the total number of visitors with a known regional destination in Ontario.
Note: The sum of each column is greater than 100% because visitors visit multiple locations in a given trip

Sunset Country had the highest proportion of overnight pleasure visitors from outside Ontario (76.6%), mainly because of the visitors from the U.S. and Manitoba. Metro Toronto had the second highest proportion of overnight pleasure visitors from outside Ontario (70.6%) primarily due to the U.S. and overseas countries, but also due to visitors from Canadian provinces other than Ontario. Finally, Algoma had the third highest proportion of overnight pleasure visitors from outside Ontario (64.7%), mainly due to visitors from the United States.

Overnight pleasure visitors from overseas countries moved around the province much more than overnight pleasure visitors from other origins, visiting on average 1.69 Ontario travel regions. American overnight pleasure visitors visited, on average, 1.14 travel regions and Canadians 1.03 travel regions. These observations seem to validate the data presented earlier on activities which showed that overnight pleasure visitors from overseas countries had the highest incidence of participation in sightseeing (90.6%), followed by Americans.

TABLE 14: The Top Overnight Pleasure Markets for each one of Ontario's Travel Regions, 1998

RegionVisited	% of a Region's Overnight Pleasure Visitors Coming from (Origin):	
Southwestern Ontario	Southwestern (590,000)	33.4%
	Michigan (413,000)	23.4%
	Festival Country (231,000)	13.1%
	Ohio (129,000)	7.3%
Festival Country	New York (489,000)	13.4%
	Festival Country (448,000)	12.2%
	Metro Toronto (350,000)	9.6%
	Michigan (259,000)	7.1%
Lakelands	Metro Toronto (1,116,000)	31.7%
	Festival Country (870,000)	24.7%
	Lakelands (500,000)	14.2%
	Getaway Country (443,000)	12.6%
Metro Toronto	New York (220,000)	8.6%
	Ontario East (202,000)	7.9%
	Michigan (181,000)	7.1%
	Southwestern (158,000)	6.2%
	UK (139,000)	5.4%
Getaway Country	Getaway Country (686,000)	33.5%
	Metro Toronto (528,000)	25.8%
	Festival Country (283,000)	13.8%
	Ontario East (172,000)	8.4%
Ontario East	Ontario East (905,000)	35.4%
	Quebec (224,000)	8.8%
	New York (172,000)	6.7%
	Festival Country (160,000)	6.3%
Near North	Festival Country (97,000)	19.0%
	Metro Toronto (58,000)	11.4%
	Getaway Country (55,000)	10.8%
	Lakelands (55,000)	10.8%
Rainbow Country	Rainbow Country (205,000)	20.3%
	Festival Country (147,000)	14.6%
	Metro Toronto (136,000)	13.5%
	Getaway Country (120,000)	11.9%
Algoma Country	Algoma Country (95,000)	15.0%
	Wisconsin (90,000)	14.2%
	Michigan (83,000)	13.1%
	Ohio (56,000)	8.8%
James Bay Frontier	James Bay Frontier (210,000)	63.6%
	Festival Country (23,000)	7.0%
	New York (14,000)	4.2%
	Ontario East (12,000)	3.6%
North Of Superior	North Of Superior (179,000)	37.6%
	Minnesota (48,000)	10.1%
	Wisconsin (23,000)	4.8%
	Festival Country (20,000)	4.2%
Sunset Country	Manitoba (205,000)	29.6%
	Sunset Country (106,000)	15.3%
	Minnesota (101,000)	14.6%
	Wisconsin (56,000)	8.1%

Over half of Ontario's travel regions depend to a large extend on their own residents to supply them with the largest proportion of overnight pleasure visitors, while overseas countries play somewhat of a role only in Metro Toronto. Table 14 suggests that the vast majority of Ontario's travel regions cannot depend on the overseas countries to supply them with overnight pleasure visitors. If in a given year these regions do not perform well in the domestic and/or the U.S. overnight pleasure markets, then their tourism industry will perform poorly irrespective of how well they perform in the overseas markets.

Metro Toronto was the most diversified Ontario travel region in that its top four overnight pleasure markets accounted only for 29.8% of the region's total overnight pleasure visitors. For all other travel regions, with the exception of Festival Country, the top four markets accounted for over half of their overnight pleasure visitors, with James Bay Frontier being the region most heavily dependent on a single market (its own residents accounted for 63.6% of its overnight pleasure visitors).

The average length of stay of overnight pleasure visitors in Ontario's travel regions ranged from a low of 2.26 nights in Festival Country to a high of 4.49 nights in Sunset Country. With the exception of Algoma, Ontario's northern regions experienced longer lengths of stay than its southern regions – a reflection, in part, of their remoteness, the difficulty of getting there and the relatively higher transportation costs.

HOW MUCH DID THEY SPEND IN ONTARIO?

The expenditures of pleasure visitors accounted for 42.1% of the total spending in Ontario by all visitors, while the spending of the overnight pleasure visitors accounted for 41.0% of the total expenditures of all overnight visitors in the province.

Overall, pleasure visitors had an average spending per person visit of $118, as

compared to an average of $119 of the general visitor population. Overnight pleasure visitors had an average spending per person visit of $210, while the general overnight visitor of Ontario had a slightly higher average of $232 per person visit.

TABLE 15: Total Spending Assigned to Ontario, 1998

Visitors' Length of Stay	All Visitors (Millions)	Share	Pleasure Visitors (Millions)	Share
Same Day	$3,444	27.1%	1,560	29.1%
Overnight	$9,287	72.9%	3,805	70.9%
Total	$12,731	100.0%	5,365	100.0%

Ontario residents had the lowest average spending per overnight pleasure visit ($120), as well as per overnight party visit ($236) and per overnight party per night ($84).

Overnight pleasure visitors from the U.S. had an average spending per person visit that was over two and a half times higher than that of Ontarians' ($318), while overseas overnight pleasure visitors had an average per person visit spending that was almost seven and a half times higher than that of Ontarians' ($878), partly because of high transportation costs to reach Ontario.

Overnight pleasure visitors from the UK had the highest average spending per person visit as well as per party visit, while Japanese overnight pleasure visitors had the highest average spending per party per night.

Although the overnight pleasure visitors from Japan had the highest average spending on a daily basis, given that they did not stay long in Ontario (2.26 nights as compared to 8.12 nights for German and 7.52 for UK overnight pleasure visitors), their average spending per party visit or person visit was low when compared to that of the UK or the German overnight pleasure visitors.

Overnight pleasure visitors from the UK had the highest average spending per person or per party visit because they also stayed the longest in the province (after the Germans).

When the transportation costs are removed from the overnight pleasure visitors spending, the ranking of the high yield markets changes somewhat. Although Japanese overnight pleasure visitors continue to have the highest average spending per party per night, it is now the US border states that have the second highest average spending per party per night, followed by the overnight pleasure visitors from the UK (see Table 18).

TABLE 16: Overnight Pleasure Visitors, 1998
Average Expenditures in Ontario

Origin of Visitors	Average per Person	Average per Party	Average per Party per Night
Total Canada	$127	$248	$86
Ontario	$120	$236	$84
Total USA	$318	$786	$261
USA Border States	$300	$749	$268
Total Overseas	$878	$1,920	$277
UK	$1,232	$2,712	$354
France	$662	$1,356	$312
Germany	$928	$2,049	$247
Japan	$735	$1,620	$615

Table 16 demonstrates that, when all expenditures are taken into account, the overnight pleasure visitors from the UK constitute Ontario's highest yield market, followed by Germans and Japanese. However, as was the case with the various activity groups and the number of nights they generated, one needs to look at the expenditures shares of each of these visitor groups to determine their value to the provincial economy and not just their average spending per party visit. This is done in Table 17.

According to this table, although the UK, Japan and Germany maintained their importance within the overseas group, it was the Ontario residents that contributed by far the most to the total spending of overnight pleasure visitors in the province, accounting for 36.8% of this spending. Ontario was followed by Michigan,

RegionVisited	% of a Region's Overnight Pleasure Visitors Coming from (Origin):	
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	Festival Country (160,000)	6.3%
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TABLE 16: Overnight Pleasure Visitors, 1998 Average Expenditures in Ontario

Origin of Visitors	Average per Person	Average per Party	Average per Party per Night
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TABLE 17: Overnight Pleasure Visitors' Total Spending by Origin, 1998		
Origin of Visitors	Total Spending (millions)	Share (%)
Total Canada	$1,607	42.2
Ontario	$1,400	36.8
Quebec	$87	2.3
Total USA	$1,452	38.2
USA Border States	$1,023	26.9
Michigan	$284	7.5
New York	$231	6.1
Ohio	$146	3.8
Pennsylvania	$119	3.1
Wisconsin	$92	2.4
Illinois	$84	2.2
Minnesota	$65	1.7
California	$47	1.2
New Jersey	$35	0.9
Total Overseas	$746	19.6
UK	$228	6.0
France	$75	2.0
Germany	$79	2.1
Japan	$81	2.1

New York, UK, Ohio and Pennsylvania. Japan and Germany ranked almost at the bottom of list presented in Table 17, behind Quebec and Illinois.

Table 18 demonstrates, that the further away an overnight pleasure visitor's place of residence was from Ontario, the higher the share of transportation expenditures and the lower the share of the items purchased locally while in the province. Accommodation accounted for the highest share of the overnight pleasure visitors' non-transport related spending in Ontario (39.6%), followed by food/beverage (28.2%).

Among all origin groups, overnight pleasure visitors from the U.S., and especially those from Ontario's Border States, had the highest share of their non-transport related expenditures going to accommodation, partly because this group of visitors had the highest incidence of commercial roofed accommodation usage (overnight pleasure visitors from the U.S. spent 61.3% of their nights in Ontario in commercial roofed accommodation, as compared to 40.4% for overnight pleasure visitors from overseas countries and 23.5% for Canadians).

Overnight pleasure visitors from overseas countries had the highest share of their non-transport expenditures going to retail shopping and the lowest share among all origin groups going to recreation or entertainment. Again these observation imply that the overnight pleasure visitors from overseas countries come to Ontario to see the region (sightseeing) and to shop, but not to attend recreational attractions. Finally, Canadians and Ontarians had the highest share of their non-transport expenditures in Ontario going to food/beverage.

Overnight pleasure visitors from the UK had the highest average spending on accommodation, on food/beverage, on recreation and on retail, per person, as well as per party, visit. However, on a per party-night basis, overnight pleasure visitors from Japan had the highest average spending on accommodation, on food/beverage and on retail, while overnight pleasure visitors from Ontario's Border States had the highest average spending on recreation.

The above discussion seems to point out that in calculating the tourism benefits of a market segment to a particular tourism sector one needs to weight the average spending per party of that market segment with the likelihood that these visitors will participate in that particular tourism sector (e.g., the incidence of utilisation of commercial roofed accommodation) and the likelihood, or effort that is required to attract a visitor from that particular market segment. For example, the marketing effort required to convince a Japanese visitor to take an overnight pleasure trip to Ontario is probably much higher than the effort required to convince an American residing in one of Ontario's Border States to visit the province.

TABLE 18: Pleasure Visitors Spending and Budgets in Ontario by Origin, 1998

Item of Expenditure	Origin of Overnight Pleasure Visitors							
	Canada	Ontario	USA	USA Border States	Over-seas	UK	Ger-many	Japan
Spending by overnight pleasure visitors, excluding transport related expenditures (millions)	$1,253	$1,081	$1,290	$928	$475	$133	$51	$43
% of total spending in Ontario by overnight pleasure visitors	78.0%	77.2%	88.9%	90.7%	63.7%	58.2%	64.9%	53.3%
Average Spending								
Per person	$99	$92	$282	$272	$559	$717	$603	$392
Per party	$194	$182	$692	$680	$1,222	$1,579	$1,330	$863
Per party night	$67	$65	$232	$243	$176	$206	$160	$328
Accommodation (millions)	$477	$414	$554	$407	$164	$49	$19	$18
As a % of non-transport spending by overnight pleasure	38.1%	38.3%	42.9%	43.9%	34.5%	36.8%	37.3%	41.9%
Average Spending								
Per person	$38	$35	$121	$119	$193	$266	$224	$161
Per party	$74	$70	$300	$298	$423	$586	$494	$355
Per party night	$26	$25	$100	$107	$61	$77	$60	$135
Food/Beverage (millions)	$441	$381	$298	$213	$113	$32	$14	$9
As a % of non-transport spending by overnight pleasure	35.2%	35.2%	23.1%	23.0%	23.8%	24.1%	27.5%	20.9%
Average Spending								
Per person	$35	$33	$65	$62	$133	$175	$161	$85
Per party	$68	$64	$161	$156	$291	$385	$354	$186
Per party night	$24	$23	$54	$56	$42	$50	$43	$71
Recreation/Entertainment (millions)	$175	$150	$238	$177	$63	$19	$6	$5
As a % of non-transport spending by overnight pleasure	14.0%	13.9%	18.4%	19.1%	13.3%	14.3%	11.8%	11.6%
Average Spending								
Per person	$14	$13	$52	$52	$74	$101	$74	$45
Per party	$27	$25	$129	$130	$162	$222	$163	$100
Per party night	$9	$9	$43	$46	$23	$29	$20	$38
Retail (millions)	$160	$137	$200	$131	$135	$33	$12	$11
As a % of non-transport spending by overnight pleasure	12.8%	12.7%	15.5%	14.1%	28.4%	24.8%	23.5%	25.6%
Average Spending								
Per person	$13	$12	$44	$38	$159	$175	$145	$101
Per party	$25	$23	$108	$96	$347	$386	$319	$222
Per party night	$9	$8	$36	$34	$50	$50	$39	$84

TABLE 17: Overnight Pleasure Visitors Total Spending by Origin, 1998		
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Minnesota	$65	1.7
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Among all origin groups, overnight pleasure visitors from the U.S., and especially those from Ontario's Border States, had the highest share of their non-transport related expenditures going to accommodation, partly because this group of visitors had the highest incidence of commercial roofed accommodation usage (overnight pleasure visitors from the U.S. spent 61.3% of their nights in Ontario in commercial roofed accommodation, as compared to 40.4% for overnight pleasure visitors from overseas countries and 23.5% for Canadians).

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The above discussion seems to point out that in calculating the tourism benefits of a market segment to a particular tourism sector one needs to weight the average spending per party of that market segment with the likelihood that these visitors will participate in that particular tourism sector (e.g., the incidence of utilisation of commercial roofed accommodation) and the likelihood, or effort that is required to attract a visitor from that particular market segment. For example, the marketing effort required to convince a Japanese visitor to take an overnight pleasure trip to Ontario is probably much higher than the effort required to convince an American residing in one of Ontario's Border States to visit the province.

TABLE 18: How Overnight Pleasure Visitors Spent their Non-transport Budget in Ontario by Origin, 1998

Item of Expenditure	Origin of Overnight Pleasure Visitors							
	Canada	Ontario	USA	USA Border States	Over-seas	UK	Ger-many	Japan
Spending by overnight pleasure visitors, excluding transport related expenditures (millions)	$1,253	$1,081	$1,290	$928	$475	$133	$51	$43
% of total spending in Ontario by overnight pleasure visitors	78.0%	77.2%	88.9%	90.7%	63.7%	58.2%	64.9%	53.3%
Average Spending								
Per person	$99	$92	$282	$272	$559	$717	$603	$392
Per party	$194	$182	$692	$680	$1,222	$1,579	$1,330	$863
Per party night	$67	$65	$232	$243	$176	$206	$160	$328
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As a % of non-transport spending by overnight pleasure	38.1%	38.3%	42.9%	43.9%	34.5%	36.8%	37.3%	41.9%
Average Spending								
Per person	$38	$35	$121	$119	$193	$266	$224	$161
Per party	$74	$70	$300	$298	$423	$586	$494	$355
Per party night	$26	$25	$100	$107	$61	$77	$60	$135
Food/Beverage (millions)	$441	$381	$298	$213	$113	$32	$14	$9
As a % of non-transport spending by overnight pleasure	35.2%	35.2%	23.1%	23.0%	23.8%	24.1%	27.5%	20.9%
Average Spending								
Per person	$35	$33	$65	$62	$133	$175	$161	$85
Per party	$68	$64	$161	$156	$291	$385	$354	$186
Per party night	$24	$23	$54	$56	$42	$50	$43	$71
Recreation/Entertainment (millions)	$175	$150	$238	$177	$63	$19	$6	$5
As a % of non-transport spending by overnight pleasure	14.0%	13.9%	18.4%	19.1%	13.3%	14.3%	11.8%	11.6%
Average Spending								
Per person	$14	$13	$52	$52	$74	$101	$74	$45
Per party	$27	$25	$129	$130	$162	$222	$163	$100
Per party night	$9	$9	$43	$46	$23	$29	$20	$38
Retail (millions)	$160	$137	$200	$131	$135	$33	$12	$11
As a % of non-transport spending by overnight pleasure	12.8%	12.7%	15.5%	14.1%	28.4%	24.8%	23.5%	25.6%
Average Spending								
Per person	$13	$12	$44	$38	$159	$175	$145	$101
Per party	$25	$23	$108	$96	$347	$386	$319	$222
Per party night	$9	$8	$36	$34	$50	$50	$39	$84

HOW DID ONTARIO'S INTERNATIONAL VISITORS EVALUATE VARIOUS ASPECTS OF THEIR TRIP?

International visitors were asked to rate various aspects of their stay in Ontario relative to their home country. The majority of the American visitors who were on an overnight pleasure trip to Ontario rated transportation services, accommodation services, hospitality of local people and the variety of things to see and do as essentially the same in Ontario as in the United States.

TABLE 19: Overnight Pleasure Visitors in Ontario
"In comparison with your home country, how would you rate the following aspects of your trip in Canada?"

Origin of Visitors	Services Being Evaluated				
	Transport Services	Accom-modation Services	Hospitality of Local People	Value for Money	Variety of Things to See & Do
USA					
Better	18.4%	12.1%	37.4%	55.4%	23.1%
Same	71.1%	79.0%	58.3%	31.8%	70.7%
Not as good	10.5%	8.9%	4.3%	12.9%	6.2%
Border States					
Better	17.5%	13.2%	36.6%	56.3%	26.1%
Same	72.7%	78.7%	59.5%	31.5%	67.0%
Not as good	9.7%	8.1%	3.8%	12.2%	6.9%
Overseas					
Better	41.3%	37.8%	55.2%	48.0%	43.2%
Same	42.5%	56.8%	40.3%	36.4%	49.3%
Not as good	16.2%	5.4%	4.5%	15.6%	7.6%
UK					
Better	45.8%	42.9%	62.2%	78.6%	37.9%
Same	41.8%	53.5%	35.3%	19.4%	55.9%
Not as good	12.4%	3.6%	2.6%	2.0%	6.2%
France					
Better	14.6%	31.3%	83.9%	40.5%	28.0%
Same	67.0%	60.1%	14.9%	48.8%	60.3%
Not as good	18.4%	8.7%	1.2%	10.7%	11.7%
Germany					
Better	20.1%	29.8%	68.5%	32.0%	36.4%
Same	54.5%	67.3%	29.3%	50.9%	59.3%
Not as good	25.4%	2.9%	2.2%	17.1%	4.3%
Japan					
Better	25.2%	27.2%	49.7%	52.8%	52.2%
Same	52.0%	59.9%	47.9%	30.6%	42.3%
Not as good	22.9%	12.8%	2.5%	16.6%	5.5%

Given the low value of the Canadian dollar during 1998 (the lowest ever), a majority of American overnight pleasure visitors also rated "value for money" as being better in Ontario than back home. Although "value for money" was the only item that was ranked by Americans as being better in Ontario than in the U.S., it also had the highest negative rating (12.9%), while the hospitality of local people received the lowest negative rating from overnight pleasure visitors from the United States.

The majority of the overnight pleasure visitors from overseas countries rated the "hospitality of local people" and accommodation services as essentially the same in Ontario as back home. For the remaining services, overseas visitors were divided between those ranking them as better in Ontario and those ranking them as the same. Overall, overseas visitors had a higher negative rating of transportation services than Americans, with Germans having one of the highest negative ratings of this service (25.4%).

With respect to Ontario's primary overseas markets, overnight pleasure visitors from the UK gave Ontario high ratings for the hospitality of its people and "value for money", German and French visitors gave the province high ratings for the hospitality of its people and Japanese visitors for "value for money" and "variety of things to see and do".

OVERNIGHT PLEASURE VISITORS VS.OVERNIGHT VISITORS WHOSE PRIMARY TRIP PURPOSE WAS TO VISIT FRIENDS OR RELATIVES?

TABLE 20 : Overnight Visitors in Ontario, 1998

	Pleasure	VFR
PERCENT OF VISITORS COMING TO ONTARIO FROM:		
Canada	70.1%	87.2%
Ontario	64.7%	78.3%
Quebec	2.6%	5.1%
USA	25.2%	8.8%
Michigan	5.5%	2.4%
New York	5.2%	1.6%
Ohio	2.8%	0.5%
Overseas	4.7%	4.0%
UK	1.0%	1.0%
France	0.6%	0.2%
Germany	0.5%	0.3%
Japan	0.6%	0.1%
PERCENT OF TRAVELLING PARTIES COMPRISED OF:		
Adults only	80.3%	84.9%
One adult	38.0%	60.6%
Two adults	36.1%	22.7%
Three or more adults	6.2%	1.6%
Adults and children under 15	19.7%	15.1%
LENGTH OF STAY IN ONTARIO:		
Percent of visitors staying for 1-3 nights	77.2%	79.7%
Average length of stay (nights)	3.15	3.21
PERCENT OF VISITORS PARTICIPATING IN SELECTED ACTIVITIES:		
Participate in Outdoor/Sports	55.6%	26.3%
Sightseeing	42.0%	19.5%
Shopping	39.4%	32.3%
Visit Friends or Relatives	33.1%	98.9%
Visit Parks/Historic Sites	22.1%	7.0%
Attend Cultural Events	18.8%	8.7%
Nightlife/Entertainment	10.7%	8.5%
Attend Sports Events	8.4%	3.4%
Attend Festival or Fairs	6.5%	4.3%
Visit Theme Park	5.6%	2.4%
PERCENT OF VISITORS BY TYPES OF ACCOMMODATION:		
Roofed Commercial	42.9%	8.8%
Hotel	25.4%	3.0%
Camping/Trailer Park	17.5%	1.5%
Non-Commercial	36.8%	91.3%
PERCENT OF VISITORS IN ONTARIO BY SEASON:		
Quarter I	9.8%	16.6%
Quarter II	24.6%	22.6%
Quarter III	52.5%	33.7%
Quarter IV	13.1%	27.1%
AVERAGE SPENDING IN ONTARIO:		
Per Person	$210	$129
Per Party	$437	$209
Per Party Night	$141	$40
PERCENT OF TOTAL OVERNIGHT SPENDING ACCOUNTED FOR BY:	41.0%	20.3%

As expected, a higher proportion of overnight visitors whose primary trip purpose was to visit friends or relatives (VFR) originated in Canada than overnight pleasure visitors (87.2% vs. 70.1%) and a much lower proportion originated in the US (8.8% vs. 25.2%). However, the proportion of overnight VFR and pleasure visitors that originated in overseas countries was very similar (4.0% vs. 4.7%).

Overnight VFR visitors travelled in Ontario in adult groups, especially as single adults, while overnight pleasure visitors had a higher incidence of travel with children under 15 (19.7% vs. 15.1%).

Although a higher proportion of overnight VFR visitors (79.7% vs. 77.2%) took trips in Ontario of a short duration (1-3 nights), overnight VFR visitors stayed, on average, longer in Ontario than overnight pleasure visitors (3.21 nights vs. 3.15 nights), primarily because of the overnight VFR visitors from overseas countries.

Overnight pleasure visitors were much more active than overnight VFR visitors having a much higher incidence of participation in every activity, except visiting friends and relatives.

Overall, overnight pleasure visitors had an outdoors orientation, while VFR visitors had a shopping and VFR orientation, or a more urban orientation.

As expected a much higher proportion of overnight VFR visitors used non-commercial accommodation (91.3% vs. 36.8%), with only 1.5% of them using campgrounds/trailer parks for accommodation (as compared to 17.5% for overnight pleasure visitors).

While the majority of the overnight pleasure visitors travelled in Ontario during the third calendar quarter (52.5%), the overnight VFR visitors were much more evenly spread throughout the year (3rd quarter accounting only for 33.7% of them). As such, programs promoting the hosting of friends and relatives

HOW DID ONTARIO'S INTERNATIONAL VISITORS EVALUATE VARIOUS ASPECTS OF THEIR TRIP?

International visitors were asked to rate various aspects of their stay in Ontario relative to their home country. The majority of the American visitors who were on an overnight pleasure trip to Ontario rated transportation services, accommodation services, hospitality of local people and the variety of things to see and do as essentially the same in Ontario as in the United States.

TABLE 19 Overnight Pleasure Visitors to Ontario
[illegible]

Origin of Visitors	Services Being Evaluated				
	Transport Services	Accom-modation Services	Hospitality of Local People	Value for Money	Variety of Things to See & Do
USA					
Better	18.4%	12.1%	37.4%	55.4%	23.1%
Same	71.1%	79.0%	58.3%	31.8%	70.7%
Not as good	10.5%	8.9%	4.3%	12.9%	6.2%
Border States					
Better	17.5%	13.2%	36.6%	56.3%	26.1%
Same	72.7%	78.7%	59.5%	31.5%	67.0%
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UK					
Better	45.8%	42.9%	62.2%	78.6%	37.9%
Same	41.8%	53.5%	35.3%	19.4%	55.9%
Not as good	12.4%	3.6%	2.6%	2.0%	6.2%
France					
Better	14.6%	31.3%	83.9%	40.5%	28.0%
Same	67.0%	60.1%	14.9%	48.8%	60.3%
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Germany					
Better	20.1%	29.8%	68.5%	32.0%	36.4%
Same	54.5%	67.3%	29.3%	50.9%	59.3%
Not as good	25.4%	2.9%	2.2%	17.1%	4.3%
Japan					
Better	25.2%	27.2%	49.7%	52.8%	52.2%
Same	52.0%	59.9%	47.9%	30.6%	42.3%
Not as good	22.9%	12.8%	2.5%	16.6%	5.5%

Given the low value of the Canadian dollar during 1998 (the lowest ever), a majority of American overnight pleasure visitors also rated "value for money" as being better in Ontario than back home. Although "value for money" was the only item that was ranked by Americans as being better in Ontario than in the U.S., it also had the highest negative rating (12.9%), while the hospitality of local people received the lowest negative rating from overnight pleasure visitors from the United States.

The majority of the overnight pleasure visitors from overseas countries rated the "hospitality of local people" and accommodation services as essentially the same in Ontario as back home. For the remaining services, overseas visitors were divided between those ranking them as better in Ontario and those ranking them as the same. Overall, overseas visitors had a higher negative rating of transportation services than Americans, with Germans having one of the highest negative ratings of this service (25.4%).

With respect to Ontario's primary overseas markets, overnight pleasure visitors from the UK gave Ontario high ratings for the hospitality of its people and "value for money", German and French visitors gave the province high ratings for the hospitality of its people and Japanese visitors for "value for money" and "variety of things to see and do".

OVERNIGHT PLEASURE VISITORS VS.OVERNIGHT VISITORS WHOSE PRIMARY TRIP PURPOSE WAS TO VISIT FRIENDS OR RELATIVES?

TABLE 20 Overnight Visitors in Ontario, 1998

	Pleasure	VFR
PERCENT OF VISITORS COMING TO ONTARIO FROM:		
Canada	70.1%	87.2%
Ontario	64.7%	78.3%
Quebec	2.6%	5.1%
USA	25.2%	8.8%
Michigan	5.5%	2.4%
New York	5.2%	1.6%
Ohio	2.8%	0.5%
Overseas	4.7%	4.0%
UK	1.0%	1.0%
France	0.6%	0.2%
Germany	0.5%	0.3%
Japan	0.6%	0.1%
PERCENT OF TRAVELLING PARTIES COMPRISED OF:		
Adults only	80.3%	84.9%
One adult	38.0%	60.6%
Two adults	36.1%	22.7%
Three or more adults	6.2%	1.6%
Adults and children under 15	19.7%	15.1%
LENGTH OF STAY IN ONTARIO:		
Percent of visitors staying for 1-3 nights	77.2%	79.7%
Average length of stay (nights)	3.15	3.21
PERCENT OF VISITORS PARTICIPATING IN SELECTED ACTIVITIES:		
Participate in Outdoor/Sports	55.6%	26.3%
Sightseeing	42.0%	19.5%
Shopping	39.4%	32.3%
Visit Friends or Relatives	33.1%	98.9%
Visit Parks/Historic Sites	22.1%	7.0%
Attend Cultural Events	18.8%	8.7%
Nightlife/Entertainment	10.7%	8.5%
Attend Sports Events	8.4%	3.4%
Attend Festival or Fairs	6.5%	4.3%
Visit Theme Park	5.6%	2.4%
PERCENT OF VISITORS BY TYPES OF ACCOMMODATION:		
Roofed Commercial	42.9%	8.8%
Hotel	25.4%	3.0%
Camping/Trailer Park	17.5%	1.5%
Non-Commercial	36.8%	91.3%
PERCENT OF VISITORS IN ONTARIO BY SEASON:		
Quarter I	9.8%	16.6%
Quarter II	24.6%	22.6%
Quarter III	52.5%	33.7%
Quarter IV	13.1%	27.1%
AVERAGE SPENDING IN ONTARIO:		
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Per Party Night	$141	$40
PERCENT OF TOTAL OVERNIGHT SPENDING ACCOUNTED FOR BY:	41.0%	20.3%

As expected, a higher proportion of overnight visitors whose primary trip purpose was to visit friends or relatives (VFR) originated in Canada than overnight pleasure visitors (87.2% vs. 70.1%) and a much lower proportion originated in the US (8.8% vs. 25.2%). However, the proportion of overnight VFR and pleasure visitors that originated in overseas countries was very similar (4.0% vs. 4.7%).

Overnight VFR visitors travelled in Ontario in adult groups, especially as single adults, while overnight pleasure visitors had a higher incidence of travel with children under 15 (19.7% vs. 15.1%).

Although a higher proportion of overnight VFR visitors (79.7% vs. 77.2%) took trips in Ontario of a short duration (1-3 nights), overnight VFR visitors stayed, on average, longer in Ontario than overnight pleasure visitors (3.21 nights vs. 3.15 nights), primarily because of the overnight VFR visitors from overseas countries.

Overnight pleasure visitors were much more active than overnight VFR visitors having a much higher incidence of participation in every activity, except visiting friends and relatives.

Overall, overnight pleasure visitors had an outdoors orientation, while VFR visitors had a shopping and VFR orientation, or a more urban orientation.

As expected a much higher proportion of overnight VFR visitors used non-commercial accommodation (91.3% vs. 36.8%), with only 1.5% of them using campgrounds/trailer parks for accommodation (as compared to 17.5% for overnight pleasure visitors).

While the majority of the overnight pleasure visitors travelled in Ontario during the third calendar quarter (52.5%), the overnight VFR visitors were much more evenly spread throughout the year (3rd quarter accounting only for 33.7% of them). As such, programs promoting the hosting of friends and relatives

may significantly contribute to an extension of tourism into the shoulder seasons.

As a result of the lower utilization of commercial accommodation and their smaller size, VFR visitors accounted only for 20.3% of the total spending in Ontario by overnight visitors, while pleasure visitors accounted for 41.0%. Overnight pleasure visitors had an average spending per party-night that was three and a half times larger than that of overnight VFR visitors ($141 vs. $40) and an average spending per party visit that was double that of overnight VFR visitors.

ONTARIO's OVERNIGHT PLEASURE MARKET: 1979 - 1998

Year	Pleasure (millions)	% Rate of Change	All Overnight (millions)	% Rate of Change
1979	21.4	-	43.0	-
1980	19.8	-7.4%	41.0	-4.7%
1981	19.0	-4.1%	40.3	-1.6%
1982	17.3	-9.0%	39.6	-1.7%
1983	17.1	-1.0%	39.2	-0.9%
1984	18.2	6.0%	39.3	0.2%
1985	18.2	0.3%	42.3	7.8%
1986	18.7	2.8%	44.5	5.0%
1987	19.8	5.5%	45.5	2.4%
1988	19.3	-2.5%	47.0	3.2%
1989	17.9	-7.2%	44.5	-5.2%
1990	19.7	9.9%	48.2	8.2%
1991	21.4	8.7%	50.8	5.4%
1992	17.5	-18.0%	43.2	-14.9%
1993	17.7	1.0%	42.1	-2.5%
1994	17.6	-0.4%	40.4	-4.0%
1995	17.7	0.6%	40.4	-0.1%
1996	17.4	-1.9%	38.9	-3.6%
1997	15.6	-10.3%	35.8	-8.0%
1998	18.1	16.0%	40.0	11.7%

*The numbers in this table may vary slightly from previously published data in the Tourism Monographs or other parts of this report because a number of respondents who did not state the reason of their trip have been allocated to the various main trip purposes and included in this table.

Overnight pleasure travel in Ontario decreased by -15.4% over the period 1979-1998, from 21.4 million visits in 1979 to 18.1 million visits in 1998. In contrast, total overnight travel in Ontario declined over the same period by -7.0%.

The largest decline in overnight pleasure travel was observed in 1992 - the result of the on-going recession and an exceptionally cold and wet summer (this is the season most pleasure visitors travel in Ontario). Since 1992, however, overnight pleasure travel appears to be recovering better than the overall overnight market. On average, overnight pleasure visits increased over the period 1992-1998 by 0.8% per year, while total overnight visits have been declining at an annual average rate of –1.08%, mainly due to the decline in business travel.

The decline in overnight person visits since 1979 is attributable mainly to the decline in overnight pleasure visits taken by Ontario residents within their own province (down by 24.2% from 1979 to 1998). US overnight pleasure visits to Ontario declined, over the same period by 1.4%, while overnight pleasure visits to Ontario from overseas countries increased by 121.0%, notwithstanding the economic crisis that many overseas countries were experiencing in 1998.

As a result of these differential growth rates, Ontarians' importance in the province's overnight pleasure market declined from 72.1% in 1979, to 64.7% in 1998, the Americans' share increased to 25.3% and the overseas countries' share increased from 1.8% in 1979, to 4.7% in 1998.

Year	Origin Of Visitors			
	Canada	Ontario	USA	Overseas
1979	76.5%	72.1%	21.7%	1.8%
1980	75.6%	70.5%	22.1%	2.2%
1981	74.6%	69.4%	23.0%	2.4%
1982	73.4%	68.7%	24.4%	2.2%
1983	74.4%	69.7%	23.7%	1.9%
1984	75.1%	70.5%	23.0%	1.9%
1985	76.2%	70.9%	22.0%	1.7%
1986	74.8%	69.1%	22.9%	2.3%
1987	73.4%	68.0%	23.7%	2.8%
1988	73.5%	67.9%	23.0%	3.5%
1989	73.9%	68.1%	22.0%	4.1%
1990	76.7%	71.6%	19.3%	3.9%
1991	78.9%	74.8%	18.1%	2.9%
1992	75.0%	70.3%	21.1%	3.9%
1993	75.3%	71.1%	20.5%	4.1%
1994	72.4%	66.9%	22.6%	5.0%
1995	71.9%	66.5%	22.6%	5.5%
1996	71.2%	66.6%	22.4%	6.4%
1997	67.7%	62.5%	25.8%	6.5%
1998	70.0%	64.7%	25.3%	4.7%

GLOSSARY

ACCOMMODATION TYPE refers to the type(s) of accommodation used during the trip.

Other accommodation is a separate category in the CTS and ITS questionnaires, and includes dormitories, hostels, sleeping berths on trains and boats, etc. In many of the tabulations contained in this report, accommodation type "not stated" records have been combined with *other*.

ACTIVITIES ON TRIP. For each trip, respondents were asked to indicate whether they participated in any of a number of activities (aided measure). The activity could have occurred at any location on the trip (destination, location of overnight stop) since activity data are not captured on a location-specific basis.

EXPENDITURES ON TRIP. All dollars spent by all household members or party members who went on the trip and paid for by individuals, government or private sector business. Only expenditures incurred by visitors to Ontario are contained in this report. Spending by Ontarians on (Canadian) public fares for trips outside the province and with no visit in Ontario are not included here.

The following items of expenditures are excluded:

- food and beverage purchased prior to the trip to be used while on the trip;
- items purchased to be resold or used in a business;
- vehicles, such as cars, boats and caravans;
- capital investment, such as real estate, work of arts, rare articles and financial stocks;
- cash given to friends or relatives during a trip which does not represent payment for goods and services received, as well as donations to institutions.

EXPENDITURES IN ONTARIO. Canadian residents' expenditures on the trip are assigned by Statistics Canada to provinces of origin, destination, and location of overnight stops according to pre-set rules. Expenditures from the ITS were assigned to Ontario according to OMTOUR rules.

EXPENDITURES IN ONTARIO BY TRIP CHARACTERISTICS. Ontario expenditures reported for trips with specific characteristics such as activity, are the *dollars* assigned to Ontario by Statistics Canada for trips with the specified characteristic. They do not represent expenditures on the service or activity. For example, the average expenditures associated with trips that included visiting a theme park refer to *average* spending in Ontario on the entire trip. It does not refer to spending *while visiting theme parks*.

HOUSEHOLD/PARTY TRIP. A trip involving one or more persons from the same household/party leaving and returning together. If four persons from the same household take a trip, it counts as one household-trip.

The CTS captures household-based information, while the ITS captures party-based (not necessarily belonging to the same household) information.

MODE OF TRANSPORT. Mode of transport refers to the one used in Canada. It does not refer to the transport mode used by international visitors to come to Ontario.

PERSON NIGHT. A night spent away from home by a person taking a trip. If two persons take a trip involving three nights away from home, that counts for six person nights.

PERSON TRIP. A trip taken by one person. If two persons from the same household go on a trip, it counts for two person trips. If the same person takes two trips, it also counts for two person trips.

PURPOSE OF TRIP (MAIN). The main purpose categories include *visiting friends/relatives, pleasure, personal, business, convention*. In this report, *business convention* has been combined with *business* and *pleasure* has been combined with *non-business convention*.

QUALIFYING TRIP. A *qualifying trip* in the CTS is defined as travel from the usual place of residence to a location any distance away if an overnight trip and at least 40 km (one-way) if a same-day trip for any purpose other than as a member of an operating crew of a bus, plane, truck, etc; commuting to work or school; moving to a new residence; travel in an ambulance to a hospital or clinic; trips that did not originate in Canada and trips that longer than one year. The distance minimum of 40 km applies only to same-day trips that originate in Ontario. In all other provinces, the minimum distance for a same-day trip is 80 km. In the ITS it includes all non-residents crossing the Canadian border (excludes crews of transportation firms).

REPORTING PERIOD. An one month reporting period is used by the CTS since the second quarter of 1992. All fieldwork takes place approximately three weeks after the *end* of the reporting period. For example, during the third week in July respondents would be asked to report on trips that ended in preceding June. In the ITS A respondent is given a questionnaire which he/she is asked to fill out when his/her trip is completed.

RESPONDENT. In the CTS, a randomly selected individual in the sampled household (from the Statistics Canada Labour Force Survey sampling frame) who is at least 15 years of age. Specifically excluded from the LFS coverage are residents of Yukon and Northwest Territories, persons living on Indian Reserves, full-time members of the Canadian Armed Forces and persons living in institutions (inmates of penal institutions and patients in hospitals or nursing homes who have resided in the institution for more than six months).

VISIT. Place of overnight stay or for same day trips, the location of the trip's destination. If the respondent travelled twice to the same location during the same trip, only one visit is recorded at that location. In this report there are three types of visits at the sub-provincial level: visits that were destined to region x; visits that were destined to Ontario region y, but took an excursion to region x, and visits that were destined outside Ontario, but had an overnight stop in region x. A small number of CTS respondents with overnight trips indicated that had as their destination Ontario region x, but they spent no night in region x. These trips have been treated in this report as same day trips to region x.

MAP OF ONTARIO'S TRAVEL REGIONS